Magento User Guide

Get your web store up and running on the platform for growth

The official Magento user guide by Varien, the Magento Company

This ebook was issued to: Someone Awesome who likes to share.

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About This Guide

Welcome to the Magento User Guide, which provides an overview of the Magento eCommerce platform developed by Varien, the Magento Company.

This guide is intended for web storeowners and first-time users of Magento. It provides a quick guide through the most important steps for getting your web store up and running and ready for selling online. The options described in this user guide enable you to generate a feature-rich and attractive eCommerce interface without the need for advanced technical expertise.

This guide first introduces Magento and its key concepts (*Chapter 1, Introducing Magento,* page 11). It then introduces the daily experience that a customer can have in a Magento web store (*Chapter 2, Introducing the Frontend,* page 15) and the daily management tasks that a storeowner would perform (*Chapter 3, Introducing the Backend,* page 40). *Chapter 4, Getting Started with Magento***,** page 50, describes how to install Magento.

The rest of the chapters that follow walk you through the process of setting up your Magento web store, customizing its behavior to your requirements, entering products, managing Orders, Invoices and Shipments and achieving the best turnover and profits from your web store.

The guide includes the following chapters:

- **Chapter 1, Introducing Magento,** page 11, introduces Magento and describes its basic components and the workflow for using it.
- **Chapter 2, Introducing the Frontend,** page 15, describes the basic browsing and purchasing features provided for your customers by a web store created using Magento.
- **Chapter 3, Introducing the Backend,** page 40, describes the ongoing management tasks that you can perform in the backend while running your Magento web store on a day-to-day basis.
- **Chapter 4, Getting Started with Magento,** page 50, describes Magento system requirements and how to install and configure it.
- **Chapter 5, Setting Up Your Catalog,** page 69, describes how to create a catalog for your Magento web store, how to add products and how to define Attributes for them.

- **Chapter 6, Preparing to Sell,** page 121, describes how to prepare your web store to start selling products by defining tax charges and how products are shipped and funds accepted.
- **Chapter 7, Design and Content,** page 139, describes how to customize the look-and-feel of your web store by applying easy to use options that are provided in the Magento backend.
- **Chapter 8, Promotions,** page 149, describes a variety of ways to promote your products.
- **Chapter 9, Managing Orders and Customers,** page 175, describes how to manage customers and Orders from the backend.
- **Chapter 10, Managing Customer Generated Content,** page 185, describes how to manage customer generated content, such as ratings, reviews, tags and polls.
- **Chapter 11, Monitoring and Improving the Web Store,** page 197, describes how to monitor and improve your store by defining reports, search terms, synonyms, redirects and Google Analytics.
- **Chapter 12, Keeping Your Store Healthy,** page 204, describes how to keep your store healthy by using a staging environment, updating Magento and extending Magento
- **Chapter 13, Getting Help,** page 210, describes Varien's resources for providing you with help.
- **Index,** page 214

Support and Contacting Information

We at Varien are dedicated to providing our customers with the best possible service. We would love to hear from you.

For feedback on this book and all other inquires, please use our contact form at: http://www.magentocommerce.com/company/contact-us/

Tip: If you are having any difficulty during the installation process, Varien offers professional installation services at *http://www.magentocommerce.com/store/professional-magento-installation.*

Tip: If you require a guaranteed response time, Varien offers support agreements at *http://www.magentocommerce.com/support/****. This web page also offers consulting services to help you with any task that is not covered by support.***

Conventions Used in this Guide

Note: *This is a note.*

Tip: *This is a tip providing useful suggestions and information.*

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1 Introducing Magento

This chapter introduces Magento, describes its basic components and the workflow for using it. This chapter contains the following sections:

- **What is Magento?,** page 11
- **Magento License,** page 11
- **Magento Frontend and Backend,** page 12
- **Advanced Magento Customization Options,** page 14

What is Magento?

Magento is a feature-rich eCommerce platform built on open-source technology that provides online merchants with unprecedented flexibility and control over the look, content and functionality of their eCommerce store. Magento's intuitive administration interface features powerful marketing, search engine optimization and catalog-management tools to give merchants the power to create sites that are tailored to their unique business needs. Designed to be completely scalable and backed by Varien's support network, Magento offers companies the ultimate eCommerce solution.

Magento License

Magento is licensed under the Open Software License (OSL) v3.0, an open source certified license. More information about Magento's license can be found at http://www.magentocommerce.com/license/

Magento Frontend and Backend

The following shows the two visible interfaces of Magento.

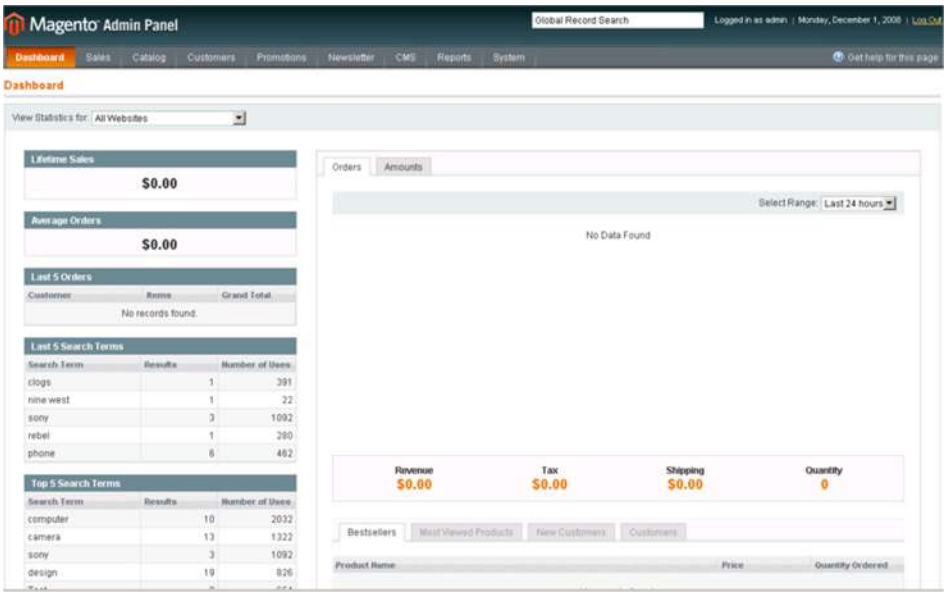
Frontend (The Web Store Front)

The frontend is the public view of your web store with which your customers can interact through a standard web browser. It presents your products, product Categories and promotions and provides your customers with ordering, payment and purchase tracking features.

An example is shown below:

Backend (The Back Office)

The backend is the password-protected view of the back office features that enable a web store administrator to setup the products and purchasing options and to manage Orders and all other store functionalities. A view of the backend is shown below.



Advanced Magento Customization Options

The options described in this user guide can get you up and running with an extremely feature-rich and attractive interface without the need for technical expertise.

If you would like to take your web store one step further, Magento provides a variety of advanced options for customizing the look-and-feel and functionality of your site. These include:

- Multiple Websites
- Multiple Web Stores
- Multiple Web Store Views
- Multiple Languages
- Custom Themes and Skins
- Extension Modules

You may refer to http://www.magentocommerce.com for a description of these options, as well as for access to resources that can assist you with their implementation.

2 Introducing the Frontend

In order to familiarize you with the features of the frontend, this chapter describes the basic browsing and purchasing features provided for your customers by a web store created using Magento. This chapter contains the following sections:

- **Overview,** page 15
- **Finding the Right Products,** page 16
- **Promotional Information, page 25**
- **Web Store Page Header and Footer,** page 31
- **Purchasing Functionality,** page 33
- **Managing Customer Relations,** page 37

Overview

The frontend provides the view of your web store that is publicly available on the Internet to customers using the Internet. The frontend shows your product catalog and provides your customers with ordering, payment and tracking features.

You can access the Magento demo web stores by navigating to http://www.magentocommerce.com/demo. The Single Store Demo is a sample Magento store that uses Magento's default theme and Sample Data. This sample store is referenced throughout this user guide.

You can access your own store by browsing to the address that you define for it during installation.

The following shows the first page of a default Magento Store with Sample Data:

Finding the Right Products

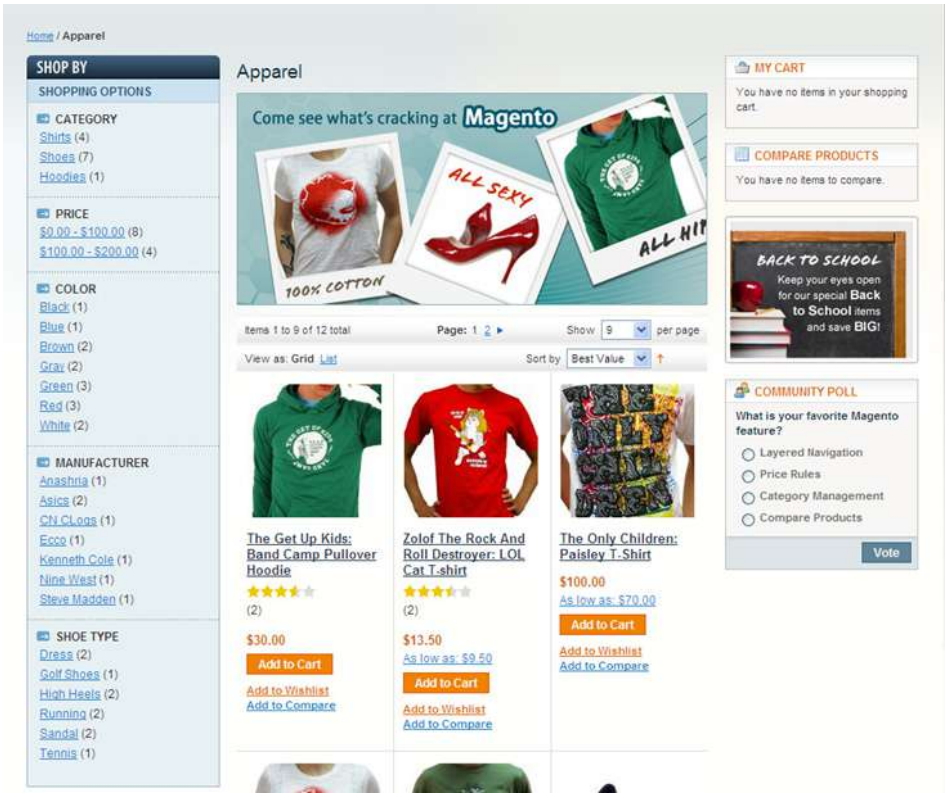
The Magento frontend is also referred to in this guide as your *web store*. It provides a variety of options for browsing through the products offered and then drilling down to view detailed information about each product, as described below. Magento enables you to define the default appearance of how multiple products are presented, such as whether they are shown as a list or grid (table), their sort order and the filter that is used.

Categories

The products in the web store are grouped into Categories, which are offered in a bar near the top of the web store page. Each product can be assigned to one or more Categories.

The Magento Demo Store provides five such Categories: **Furniture**, **Electronics**, **Apparel**, **Music** and **Ebooks. Music** and **Ebooks** show downloadable product functionality. Categories may have been assigned Sub-Categories. A customer can navigate to a Sub-Category using a Category's dropdown menu. The following shows the Sub-Categories: **Cell Phones**, **Cameras** and **Computers**:

A Category or a Sub-Category can each have a product list or show a landing page that features some products. The following shows a Category that has products:



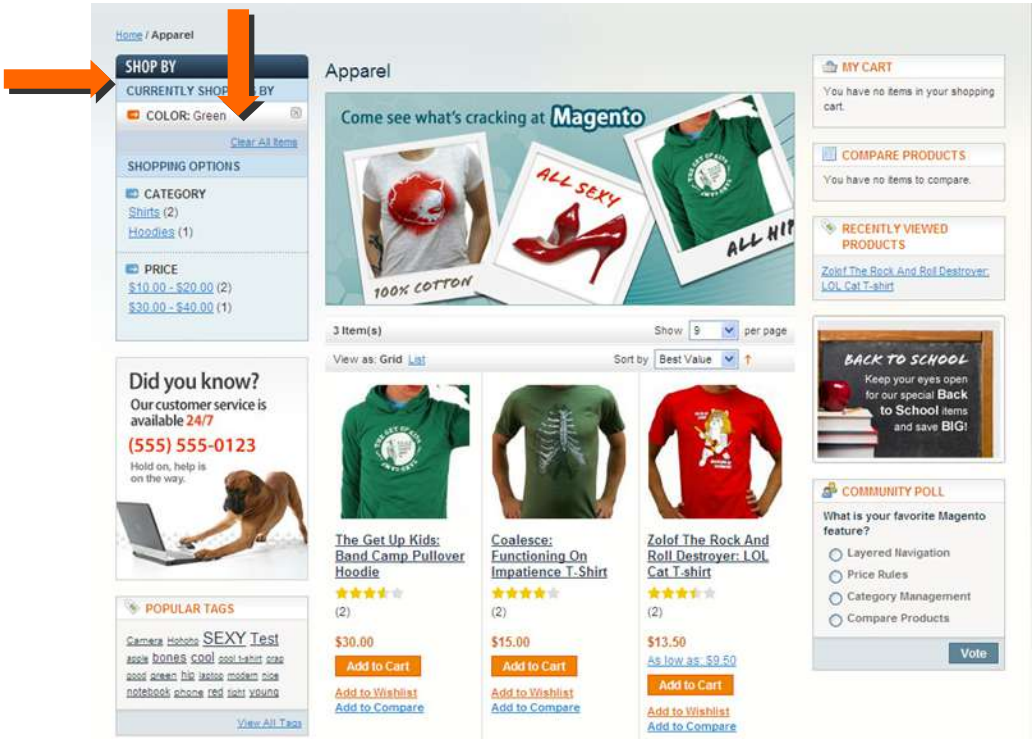
Filtering the Display of Products

Typically, the first step of a customer when browsing through the web store may be to select the Category or Sub-Category of the products of interest. The customer can then filter the products in that Category according to the various Attributes of these products.

The **SHOP BY** area on the left side of the frontend page provides a variety of product Attributes that can be used to access the products in that Category. The Attributes in a Category appear in groups, each with its own title. In the frontend page shown above, the groups that appear are **PRICE** (which shows ranges of prices), **COLOR**, **MANUFACTURER** and **SHOE TYPE**. Next to each Attribute is the number of products that have that Attribute.

For example: The Apparel Category has three green products, as shown below:

After a customer clicks on the **Green** Attribute, all the green products are displayed in the web store for browsing and the **SHOP BY** area indicates that the products in this Category have been filtered by the **Color: Green** Attribute, as shown below:

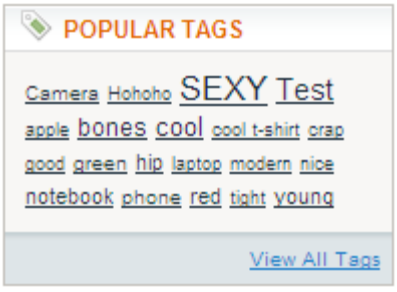


To clear the filter and thus redisplay all the products in the currently selected Category, click the icon next to the filter or the **Clear All Items** option.

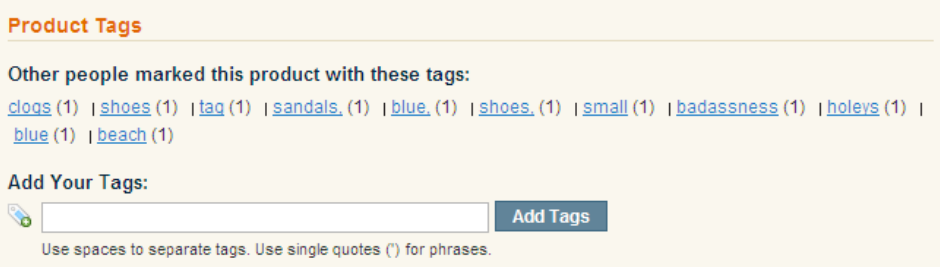
Note: *The third product is shown because it contains two variants inside: a green and a red version.*

Popular Tags

Another option that Magento provides to help customers find the right product is called Popular Tags. Popular Tags provide another property that can be assigned to products that customers can select in order to view the products to which this tag has been assigned.



Popular tags can be assigned by Customers in the product page, as follows, and can be approved and edited from the backend, if required:



Searching

The top right of your web store page provides a search field in which a customer can type all or part of the name of a product, or its Attributes, in order to find it, as shown below:

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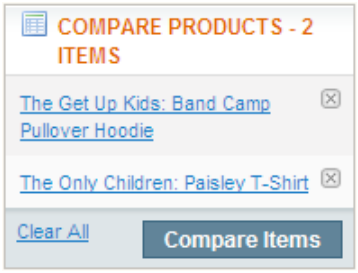
Comparing Products

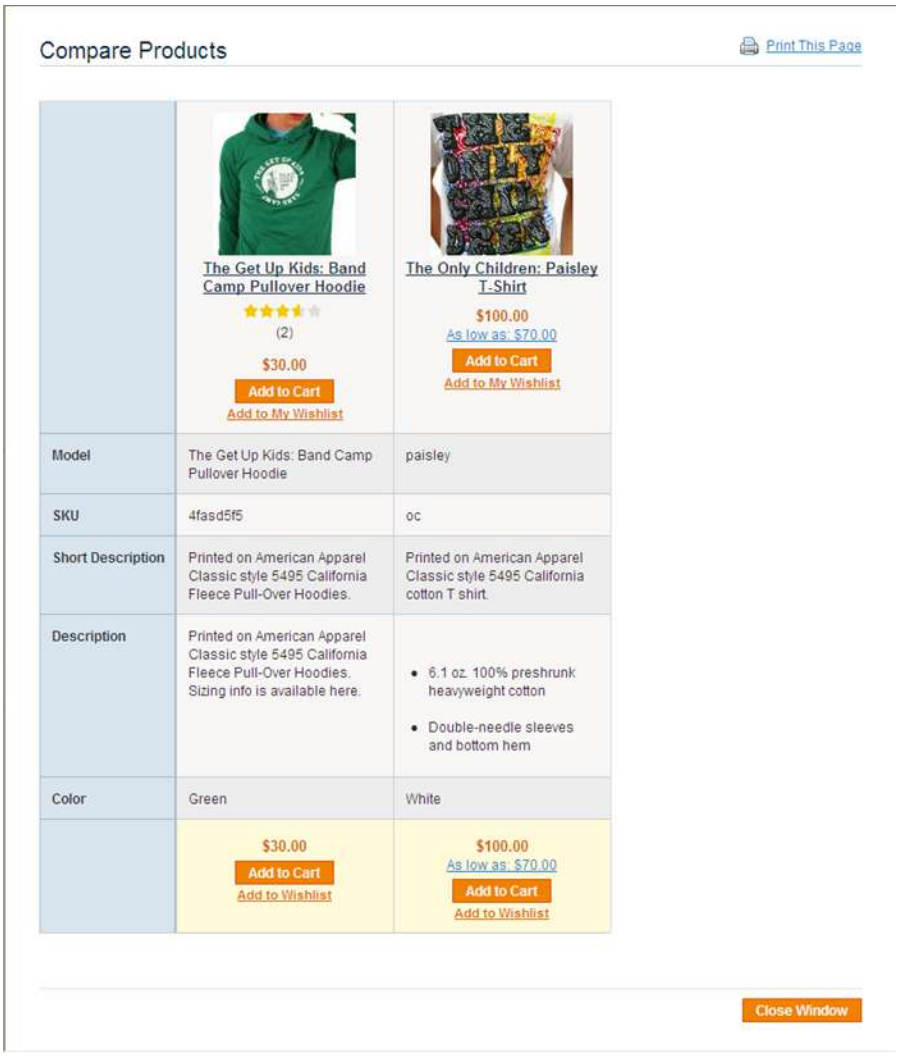
Magento enables customers to compare the products of their choice, as follows:

1. A customer first clicks the **Add to Compare** option provided for each product that he/she wants to compare, as shown below:

2. After selecting all the products to be compared, the customer then clicks the **Compare Items** button in the **COMPARE PRODUCTS** area, as shown below:



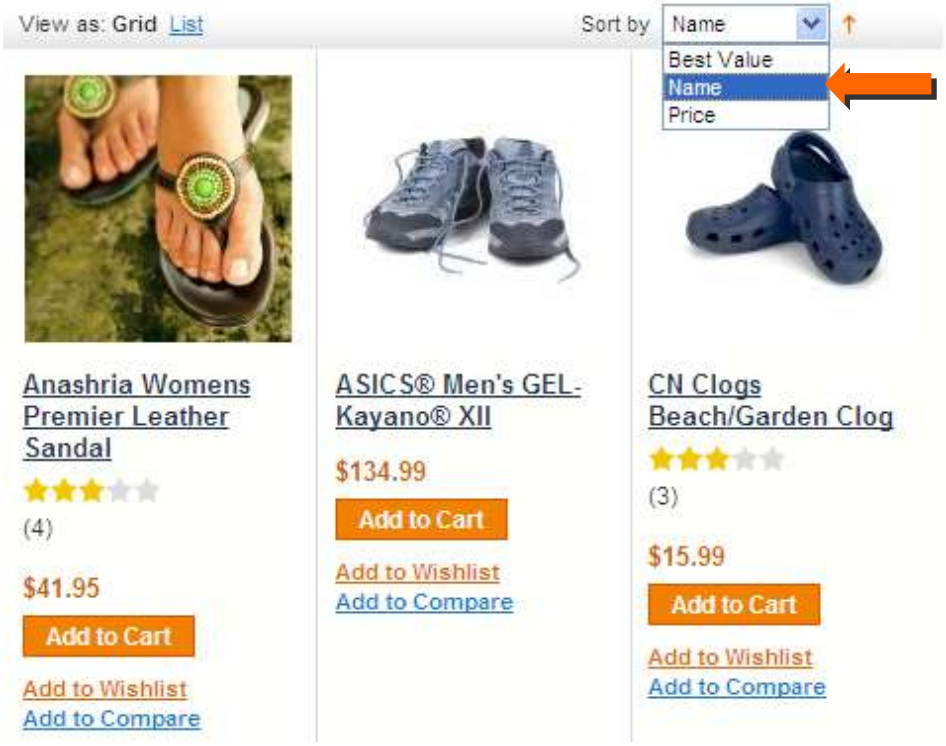
The following page is then displayed in a pop-up window:



Note: *A row also appears for each comparable Attribute defined for these products, such as Color. You may refer to the* ***Managing Product Attributes*** *section on page 81 for more information about defining Attributes.*

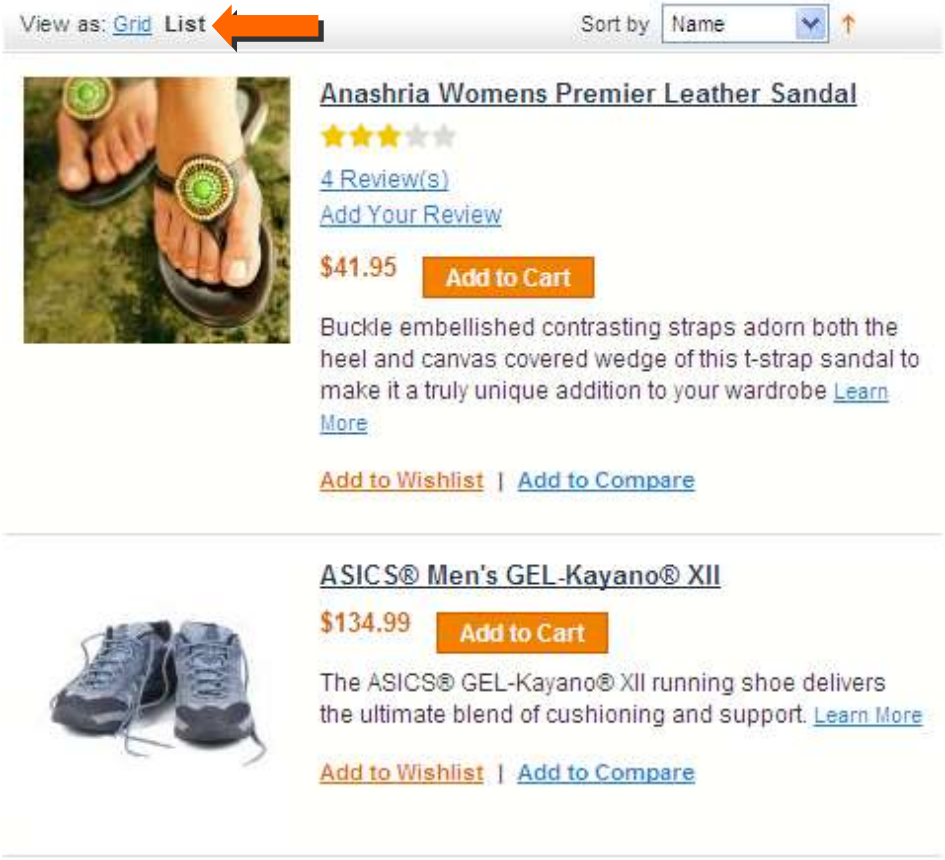
Sorting Products

A customer can sort the products that are displayed by selecting the relevant option in the **Sort by** field, as shown below:



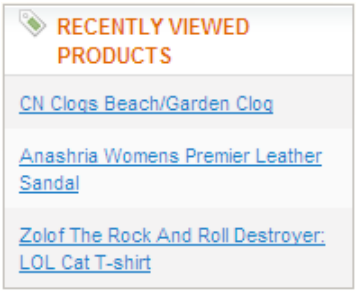
Grid/List View

Products can be displayed in a grid (table), as shown in the previous page or as a list, as shown below:



Recently Viewed

The **RECENTLY VIEWED PRODUCTS** area lists the products recently viewed by the customer, whether they were purchased or not, and enables him/her to easily link back to them.



Promotional Information

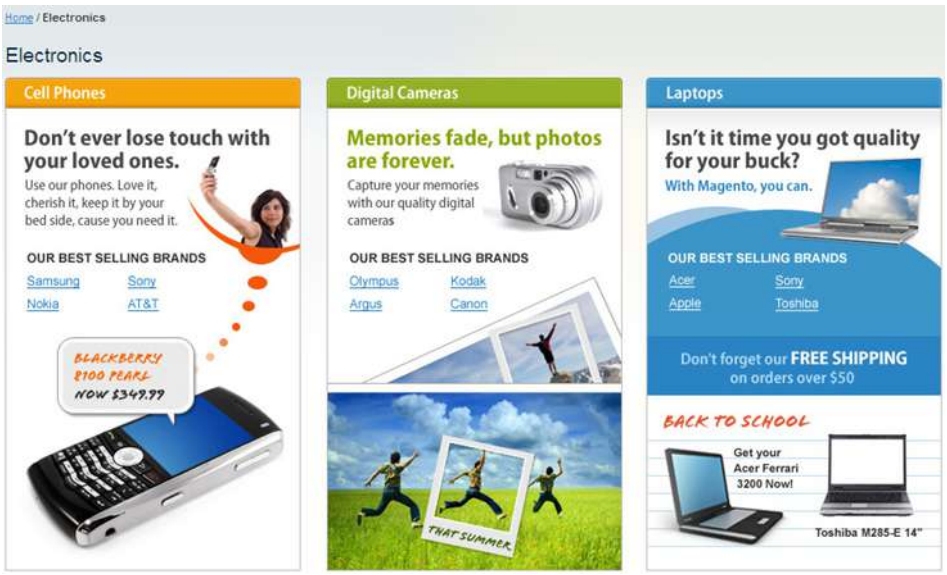
Magento provides a variety of aspects of product presentation that you can control and that enable you to promote and up-sell products to your customers.

Product List Banners

You can define the banner that appears at the top of each category landing page with a static block. This adds a graphical element to your Category pages that can be used for special promotions, or to highlight certain products. Banners can be defined per Category. More information about how to create and add static blocks on your site can be found in the *Managing CMS Pages* section on page 144.

Promotional Pages

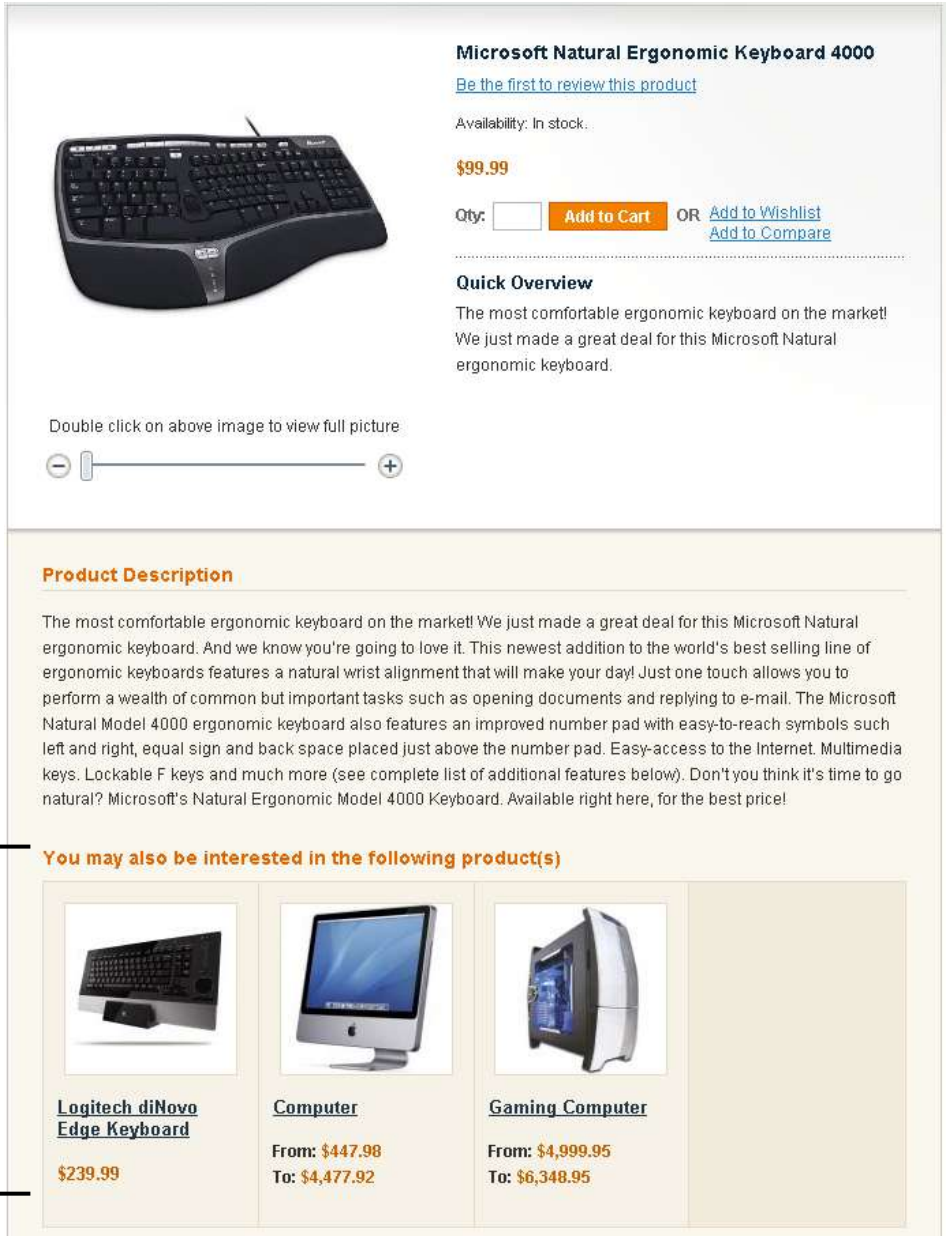
Another way of featuring products and promotions in your web store is a customized category landing page, which is a static HTML page that may be displayed while browsing a Category, instead of showing a list of products, as shown below:



Up-sell Products

Up-sell products are items that your customer could buy *instead* of the product that is being viewed. These products may be of a better quality, more expensive, be more popular or produce a higher profit margin.

This example presents a more expensive keyboard and other products as up-sells to the less expensive keyboard.



Related Products

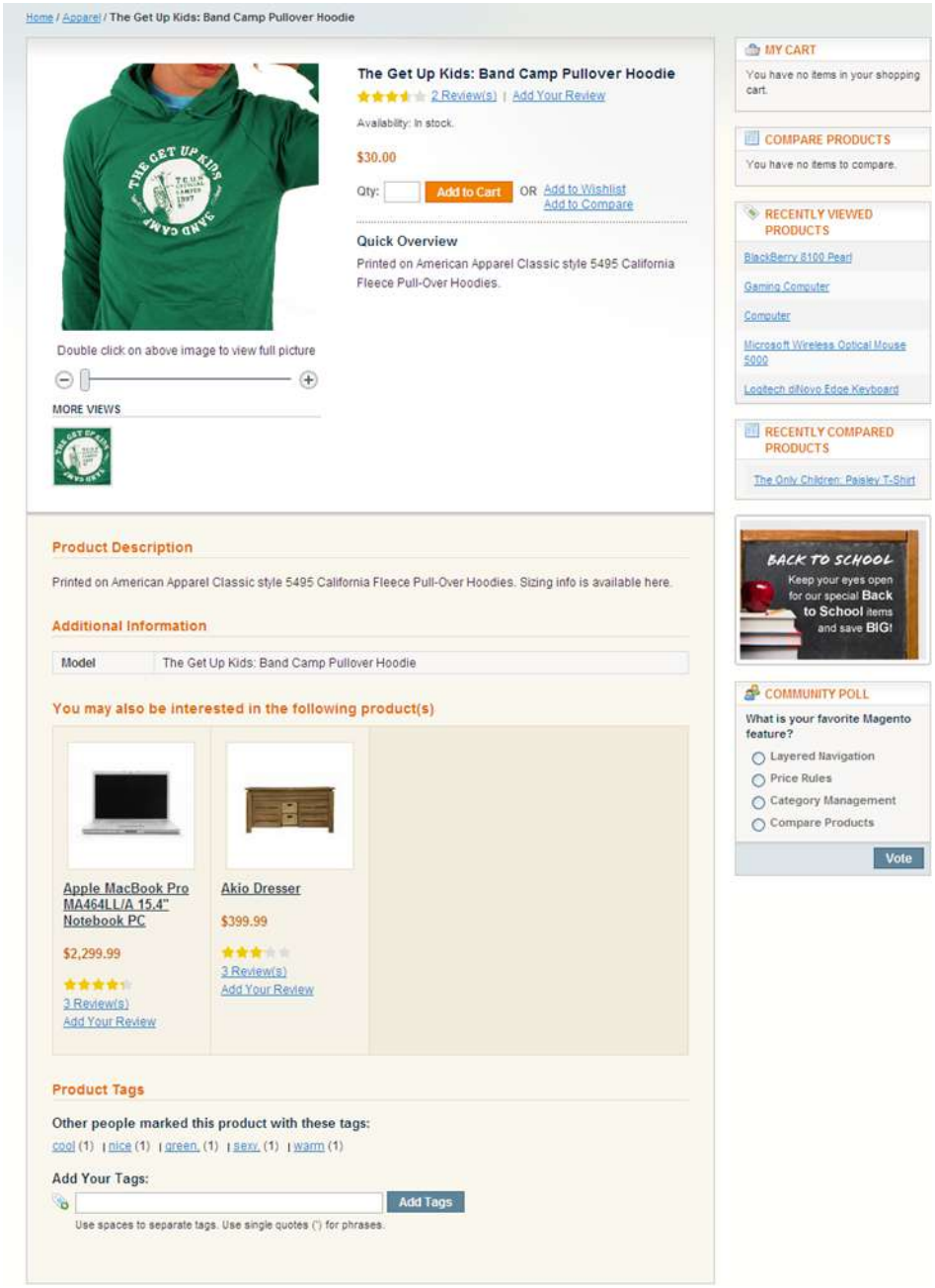
Related products are meant to be purchased **in addition** to the item the customer is viewing. Related products are shown in the right column of your web store in a separate block. The following example shows a mouse promoted as a Related Product when a keyboard is being purchased or viewed.

Cross-sell Products

Cross-sell products appear next to the shopping cart. When a customer navigates to the shopping cart page (whether automatically after adding a product or otherwise), these products are displayed as cross-sells to the items already in the shopping cart. They are similar to **impulse buys**, like magazines and candy at the cash registers in grocery stores.

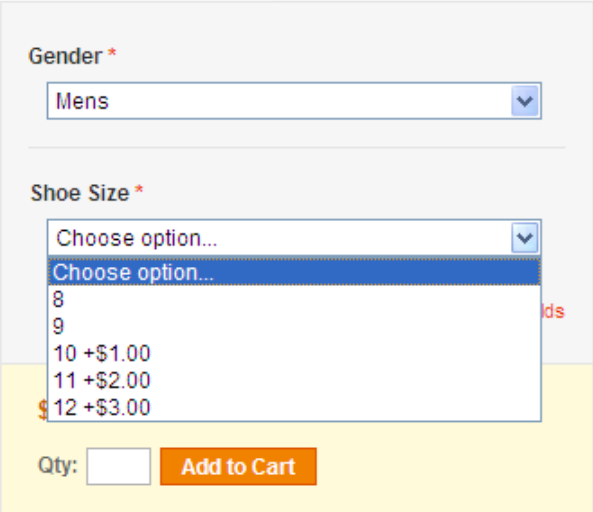
Product Pages

The backend enables you to define the type of information and functionality that is provided in a product's page. The following shows a typical product page:



Most of the features provided to present a product in your web store are self-explanatory. The following describes a few of these features:

- **Image:** The customer can use the slider to zoom in and out of the image, click on it to enlarge it, or pan it to see different parts of it.
- **Description:** The top of the page shows a short description, in the **Quick Overview** area and lower down you can see a more detailed **Product Description** area. Also, **Additional Information** details are provided about the product in the form of a table.
- **Product Tags:** Shows the tags assigned to this product. Customers can navigate to other products by clicking on one of these tags. You can also define whether customers can add tags.
- **Reviews:** Your customers can rate and review your products. The store administrator can approve or remove reviews.
- **Product Options:** Magento provides a variety of controls that enable you to configure the product options that appear for a Customer to select, such as checkboxes, dropdown menus and so on. For example, customers are able to select the size of a shoe, as follows:



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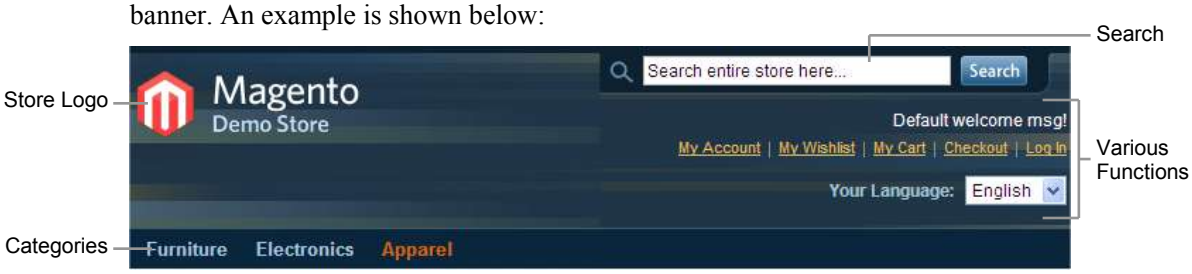
Web Store Page Header and Footer

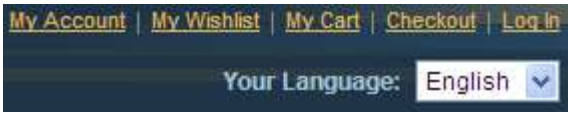
Every web store has a header that appears at the top of each page and a footer that appears at the bottom of each page. These features enable you to control the look-and-feel of your web store and provide the customer with various functions, as follows.

The Header

The default header of each of your web store pages shows your web store logo and banner. An example is shown below:



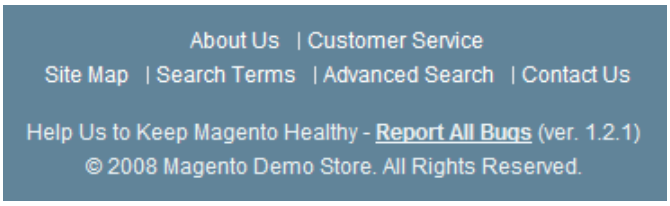
This header also provides a variety of functions on the right, as follows:



- **My Account:** Enables registered Customers to access their Orders' history, track their shipments, download products and change address information.
- **My Wish List:** Enables customers to define a list of items that they may want to purchase in the future. They can also share their wish list with their friends.
- **My Cart:** Enables customers to see the products that they have selected to purchase.
- **Checkout:** Enables customers to start the checkout process in order to specify payment, billing and shipping information.
- **Log In:** Enables each customer to identify themselves.

The Footer

The bottom of each of your web store pages shows a footer. An example is shown below:

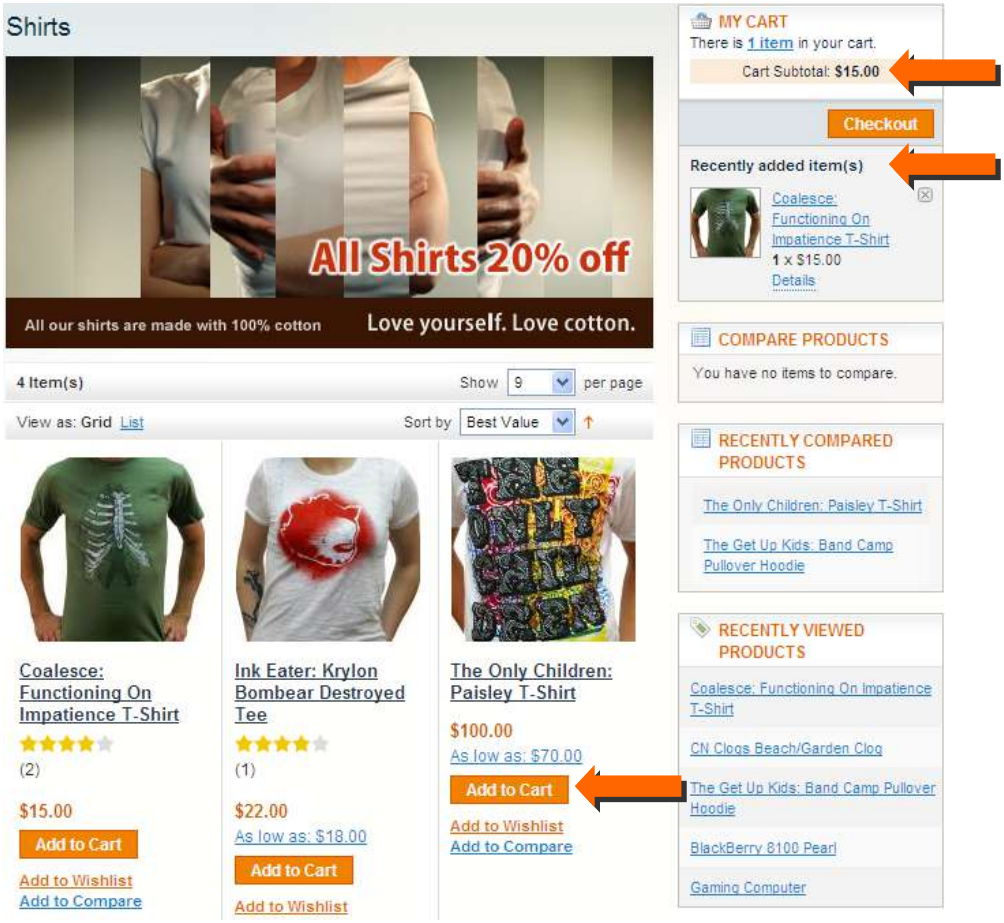


This footer generally provides links to various informational and functional pages in the site, such as Contact Us and the Site Map.

Purchasing Functionality

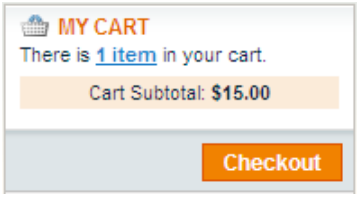
My Cart

To add a product to your shopping cart, click on the **Add to Cart** icon of that product, as shown below:

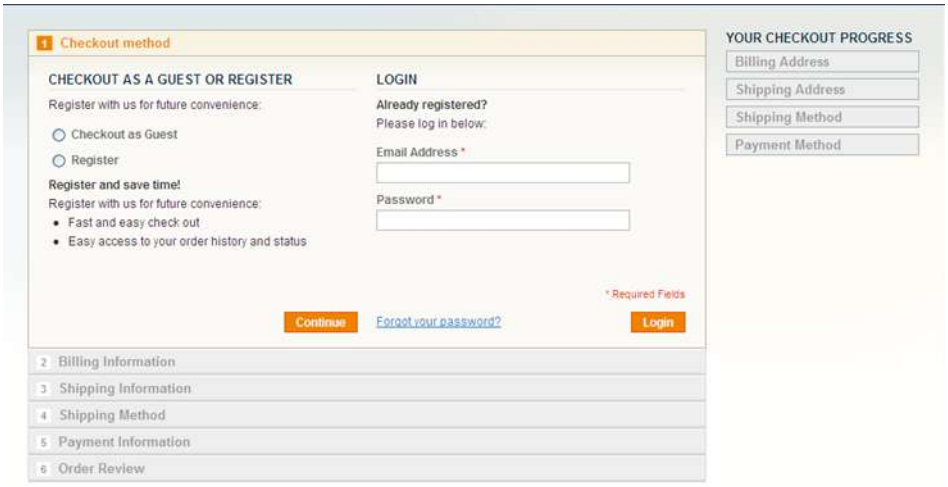


The **My Cart** area shown above displays a brief list of the products in your shopping cart. The **Recently Added items(s)** area shows a list of the last three items added to your shopping cart.

Checking Out



The **My Cart** area also provides a **Checkout** button that takes a customer to the first step of the one-page checkout process, as shown below:



Most of the functionality of the checkout process is available by default. In addition, in the backend you are offered a variety of options to customize the customer checkout process, such as various payment and shipping methods that can be offered to your Customers.

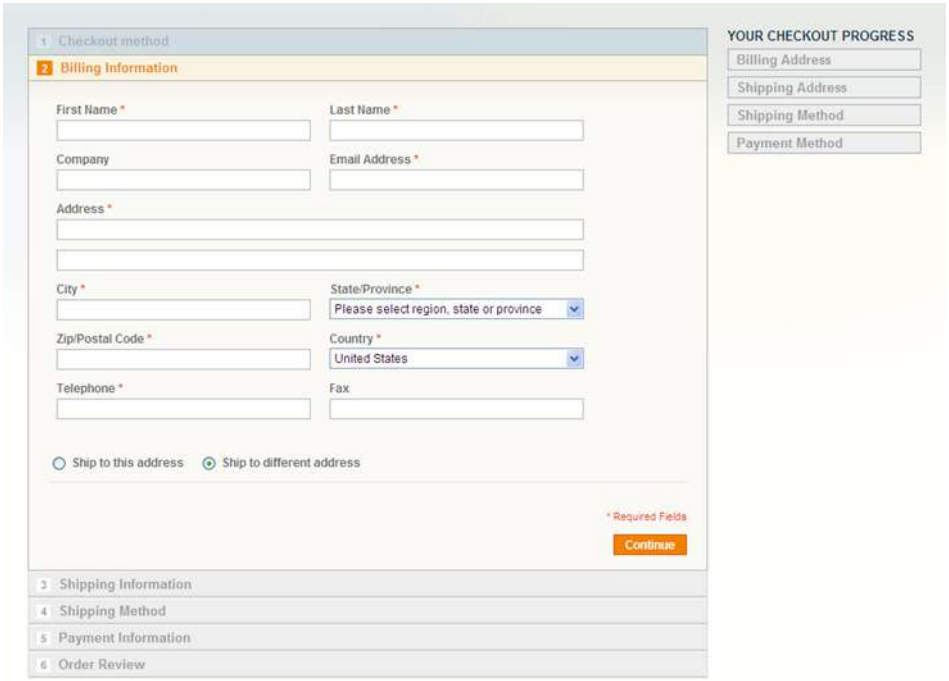
A customer can make a one-time purchase as a guest or can register and create an account. Customers that have created an account can later track the status of their Order.

Tip: *Magento also offers multi-shipping functionality that enables customers to ship items to more than one address at the same time. This is a very useful feature for sending gifts, for example.*

Tip: *Customers can also register and create an account by using the* ***My Account*** *or* ***Log In*** *link on the top right of each page.*

The following shows an example of checking out as a guest by selecting the **Checkout as Guest** option in the step above:

Click **Continue** to see the next step in which the customer can enter their billing and identification information.

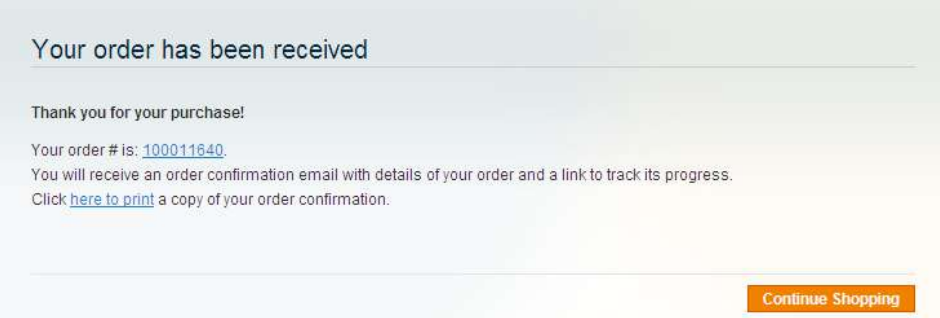


Click **Continue** to enter the **Shipping Address**, to specify the **Shipping Method** and to determine the **Payment Method**.

The last step of the checkout process enables the customer to review the entire Order:

Note: *The right column shows the summary of information entered during the previous checkout steps and enables you to change any of the information that is incorrect.*

The customer can confirm the Order and receive an Order number, or they can change their mind and edit their cart using the **Edit Your Cart** link. If they proceed with the Order and the payment is processed successfully, then the following page is displayed.



A confirmation email is then sent to the customer. The content of the email can be controlled by the web store administrator. An example is shown below:

Magento
DEMO STORE

Hello Test Customer,
Thank you for your order from Main Website Store. Once your package ships we will send an email with a link to track your order. You can check the status of your order by logging into your account. If you have any questions about your order please contact us at dummyemail@magentocommerce.com or call us at (555) 555-0123 Monday - Friday, 8am - 5pm PST.

Your order confirmation is below. Thank you again for your business.

Your Order #100000021 (placed on May 23, 2009)

Billing Information:	Payment Method:
Test Customer Test Street Test City, California, 90123 United States T: 123-123-1234	Name on the Card: Test Customer Credit Card Type: Visa Credit Card Number: xxxx-1111 Expiration Date: 03/2011

Shipping Information:	Shipping Method:
Test Customer Test Street Test City, California, 90123 United States T: 123-123-1234	Flat Rate - Fixed

Item	Sku	Qty	Subtotal
DVD player	3003	1	$150.00
		Subtotal	$150.00
		Shipping & Handling	$5.00
		Tax	$12.38
		Grand Total	**$167.38**

Thank you again,
Main Website Store

Managing Customer Relations

Customer Emails

Magento sends a variety of automatically generated customer emails (such as when a customer places an Order or opens an account) and enables you to customize them as you require. For more information about customizing the emails sent from the store to Customers you may refer to the *Customizing Transactional Emails* section on page 147.

Ratings and Reviews

Rating and review functionality is provided by Magento to enable customers and web storeowners to give their opinions, feedback and comments about products. They appear in the frontend, as follows:

The quantity of stars indicates the satisfaction rating. You can click on the **Review(s)** link to display the actual textual reviews provided by customers.

Community Polls

Each web store can provide a Community Poll, as shown below:

This page was intentionally left blank.

3 Introducing the Backend

In order to familiarize you with the features of the backend, this chapter describes the ongoing management tasks that you can perform in the backend while running your Magento web store on a day-to-day basis.

You may refer to *Chapter 5, Setting Up Your Catalog* on page 69 for a full description of how to setup your catalog and each of the subsequent chapters for a description of other aspects of customizing your backend. This chapter contains the following sections:

- **Accessing the Backend,** page 41
- **Supervising Web Store Activities,** page 43
- **Managing Orders,** page 44
- **Managing Ratings and Reviews,** page 48
- **Generating Reports,** page 48

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Accessing the Backend

The following describes how to access and log into the Magento backend and the Magento news messages.

> ***Tip:*** *Immediately after you install Magento, you can easily open the backend by clicking the* ***Go to Backend*** *button on the last page of the Magento Installation Wizard. We recommend that you bookmark the backend page for easy access.*

To access the Magento backend administration environment:

1. Use a standard web browser to navigate to the backend by entering the URL that you specified in the Magento Installation wizard with the addition of the suffix **/admin** (or the one that you specified during installation). For example if you specified **mywebstore.com** as the base URL, then use http://www.mywebstore.com/admin to access your backend.

   The Magento Demo Store backend can be accessed at: http://demo-admin.magentocommerce.com/admin

   The following log in page is then displayed:

2. Sign in using the user name and password you created during the installation process.

   > ***Note:*** *The backend of the Magento Demo Store can be accessed using the* ***User Name: admin*** *and* ***Password: 123123****.*

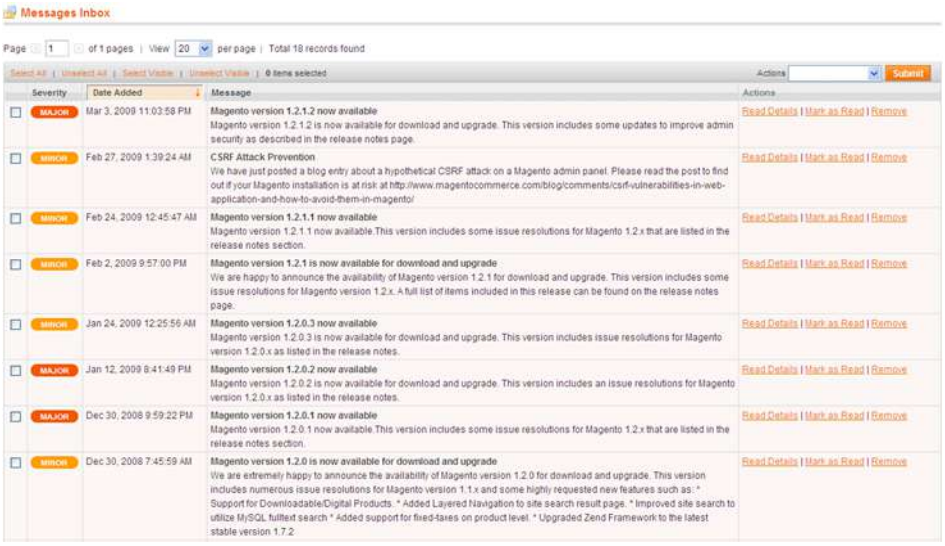
3. Click the **Login** button to display the administration panel, as shown above.

4 After you log in, the Magento messages that you have not yet read are displayed, such as the one shown below:

Additionally, information about other messages is shown in a bar just under the menu.

To display all the messages in your inbox:

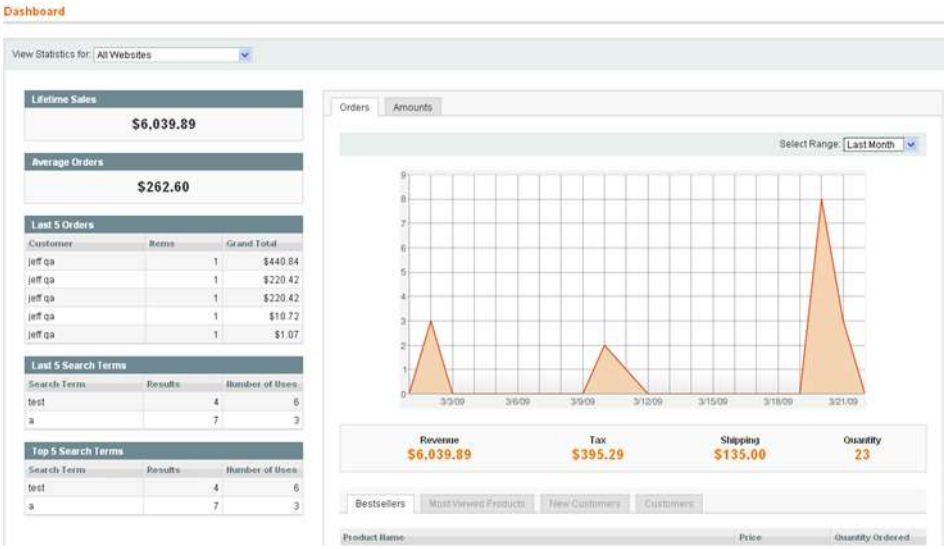
Click the **Go to messages inbox** on the top right of the page. The following page is displayed, which provides standard message handling features:



You can mark selected messages as **Read** so that they do not appear again when you log in.

Supervising Web Store Activities

The Dashboard is the first page to be displayed by default after you log in. It can also be accessed by clicking the **Dashboard** tab on the top left of the page. The page displays, as shown below:



This page shows you basic information and statistics for managing your web store. The following describes the options in this page:

- **Orders:** The **Orders** tab in the center of the page, as shown above, shows a graph indicating the quantity of Orders in your web store within the last year, meaning YTD (Year to Date). Underneath you can see the revenue, tax and shipping amounts of your Orders and the total quantity.
- **Amounts:** The **Amounts** tab in the center of the page shows a graph indicating the revenue from your web store YTD (Year to Date). Underneath, you can see the revenue, quantity, tax and shipping amounts of your Orders.
- **Left Information Panel:** The panel on the left shows you the total amount of Orders handled in your Magento web store, the average amount of each Order, information about your last five Orders and the top five products for which customers have searched.

- **Bottom Information Tabs:** The bottom of the Dashboard provides additional information about your web store, as follows:

  - **Bestsellers Tab:** Shows a list of the best selling products in your web store, their price and the quantity ordered.
  - **Most Viewed Products Tab:** Shows a list of the most recently viewed products and the number of times they were viewed.
  - **New Customers:** Shows a list of the most recently registered customers.
  - **Customers:** Shows a list of your top customers, meaning the customers that have ordered the most items from your web store in the last year.

Managing Orders

This section first describes how to view and manage Orders. It then describes how to create Orders from the backend.

Viewing the Orders in Your Web Store

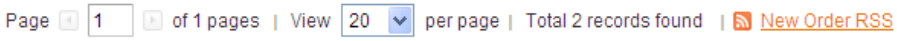
To view the Orders in your web store:

From the **Sales** menu, select the **Orders** option to display the *Orders* page, as shown below:

This page displays a list of the Orders placed in your web store.

The following describes some of the options for managing Orders in this page:

- **Quantity of Orders Displayed:** The top part of the page enables you to control how many Orders are displayed in the page, as shown below:



- **Selecting Orders:** The area under this enables you to select/unselect all the Orders in your web store or to select/unselect all the Orders currently visible, meaning those that are currently displayed in this page.

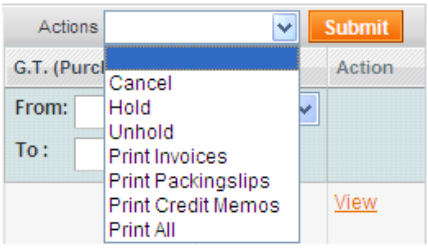
  You can also select individual Orders by clicking the checkbox on the left of each order.

- **Filtering Orders:** The area under this enables you to filter the Orders that are displayed by filling out the following fields and then clicking **Search**.

  The list displays only those Orders that have all the criteria that you specified.

- **Sorting Orders:** Click on the header of a column to sort the Orders by the value of that column. Each click toggles between an ascending sort and a descending sort.

- **Order Actions:** A dropdown menu of action options is provided. The actions that may be performed on the selected Order are as follows:



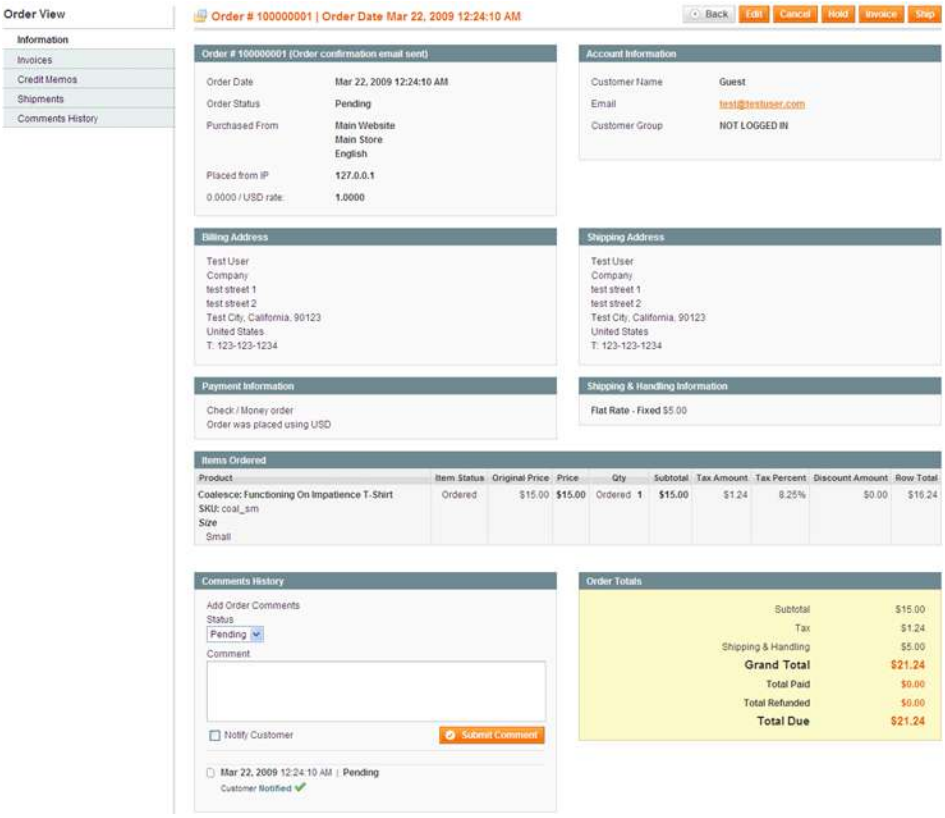
  - **Cancel:** Sets the Order status to **Canceled** and disables any further processing.
  - **Hold:** Puts the Order's Invoice on hold. The Order's definition remains in the system enabling you to use the **Unhold** option after you have verified the Order.
  - Printing options.

- **View:** To view and/or edit an existing Order, click the **View** option in an Order's row in the **Action** column to view the Order, as described below.

Viewing an Order's Details

Magento provides a large variety of information for each Order. This section shows a quick review of some of the information provided for an existing Order. The top left corner of the *Information Page* enables you to access the various pages of information provided for an Order: **Information**, **Invoices**, **Credit Memos**, **Shipments** and **Comments History**.

Information Page



This page provides an overview of the most important information about the Order, such as the current status of the Order, the products ordered, customer information, billing information, shipping information and payment information.

> ***Note:*** *SKU (Stock Keeping Unit) specifies the product code that is used to keep track of the actual inventory.*

The **Comments History** area of this page enables you to change the status of the Order and to add comments about it.

Check the **Notify Customer** checkbox to specify that customers are sent a copy of the message.

Invoices Page

An Invoice represents a confirmation of payment. The Invoices page enables you to view the list of Invoices generated for an Order.

An Invoice can be generated when you request it or as products are shipped. If the products in an Order are shipped in multiple Shipments, then an Invoice is generated for each Shipment for the products in that Shipment.

Credit Memos

The Credit Memos page displays a list of the refunds given for products in this Order. You can click on a Credit Memo in the list to display the refund details.

Shipments Page

A Shipment is a record of the products in an Order which have been shipped. Like an Invoice, multiple Shipments can be created per Order.

The Shipment page displays a list of the Shipments sent for products in this Order. You can click on a Shipment in the list to display the Shipment details.

The Shipment page can also show the Shipment tracking number that was received from the shipping service. The tracking number enables customers to review their Order using the **My Account** option that appears in the header of the frontend.

Creating New Orders

You may want to create an Order using the backend, for example when an Order is received over the phone.

Tip: *Typically, Orders are placed by customers in the frontend. In addition, you can create Orders in the backend. This enables you to take Orders by phone, mail or fax and then enter them into your web store to be managed and tracked. This feature is useful for call center operators to take Orders directly from your customers. The ordering process in the backend is not much different from the one your customers experience. The backend provides all the same functions that your customers have when creating an Order from your web store, including the ability to move products between the shopping cart and wishlist. It also enables you to give customers special prices and discounts.*

To create a new Order from the backend:

1. From the **Sales** menu, select the **Orders** option.
2. Click the **Create New Order** button on the top right.

A full description of this procedure is provided in the *Managing Orders* section on page 178.

Managing Ratings and Reviews

Rating and review functionality is provided by Magento to enable customers and web storeowners to submit their opinions, feedback and comments about products. Product Reviews and Ratings can also be added using the backend.

For more information about ratings and reviews you may refer to *Chapter 10, Managing Customer Generated Content* on page 185.

Generating Reports

Magento provides a variety of reports that you can access at any time.

From the **Reports** menu, select any of the numerous types of reports and then select a specific report of that type.

Some of the most important reports are described in the *Reports* section on page 197.

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4 Getting Started with Magento

This chapter describes Magento system requirements and how to install and configure it. This chapter contains the following sections:

- **System Requirements,** page 50
- **Installing Magento,** page 51
- **Basic Configuration,** page 60

System Requirements

The following provides a short list of the server requirements for running Magento properly. You can also view these specifications at: http://www.magentocommerce.com/system-requirements.

- **Supported Operating Systems:** Linux server
- **Supported Web Servers:** Apache 1.3.x or Apache 2.x
- **PHP Compatibility:** 5.2.0 and above with Safe mode off
- **MySQL:** 4.1.20 and above

If you are unsure whether your hosting company supports these specifications, please check with them or your company's system administrator. Alternatively, to download a script that verifies whether your server is compatible or not, you may refer to the following web page: http://www.magentocommerce.com/knowledge-base/entry/how-do-i-know-if-my-server-is-compatible-with-magento.

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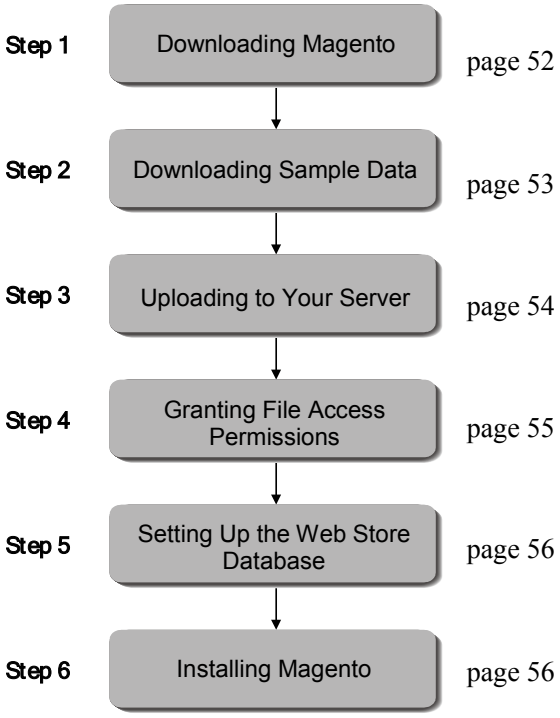
Installing Magento

After you have verified that your hosting environment meets Magento's system requirements, as specified above, you can download and then install Magento to your server.

The following is the workflow for downloading and installing Magento:



Step 1: Downloading Magento

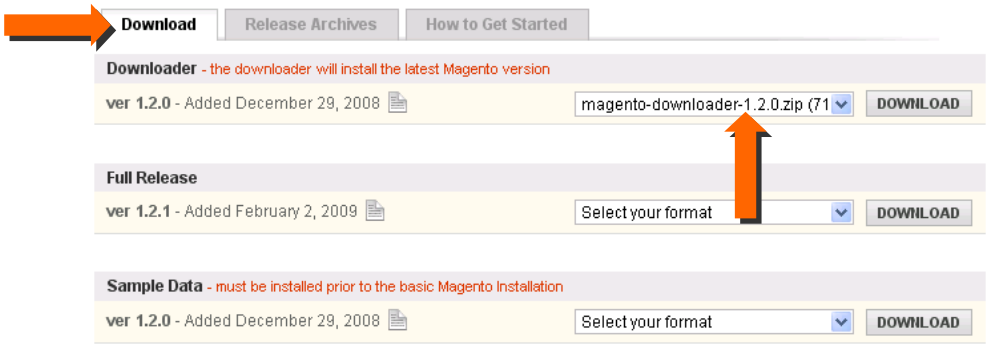
Magento can be downloaded free of charge from the Magento community site.

Tip: *You can download Magento whether you have registered on the community site or not. We recommend registering so that you can later access the various valuable resources that the community has to offer, such as: forums, wiki, groups and screencasts.*

Tip: *If you require any assistance with installing your store,Varien also offers professional installation services. For more information you may refer to the following web page: http://www.magentocommerce.com/store/professional-magento-installation.*

To download Magento:

1. Use your web browser to navigate to http://www.magentocommerce.com/download and log in to display the following page or go to http://www.magentocommerce.com and select the **Downloads** tab from the menu to display the following page.



Note: *This page will appear slightly differently on the web after a newer version is released.*

2. We recommend that you select the **Downloader** option, as shown above.

   Multiple compressed formats are provided. If you are unsure which version to download use the .zip format, as shown above.

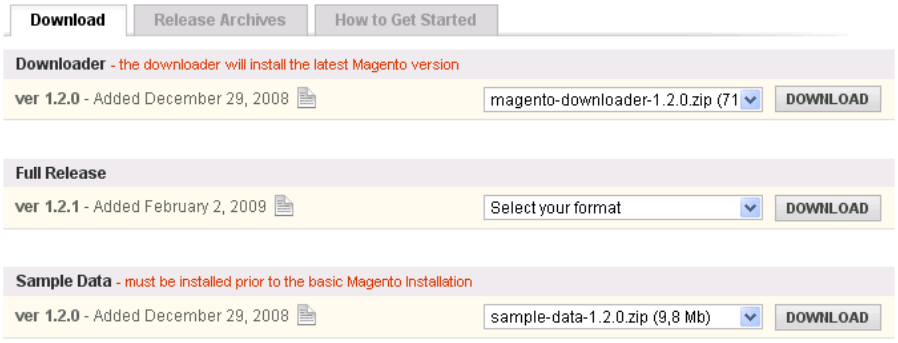
3. Click the **Download** button and save the file to the location of your choice.

Step 2: Downloading Sample Data

Magento enables you to load a few basic products and information into your web store to populate your web store frontend and backend with some initial **Sample Data**. Even though you will later delete these products, it may help orient you while getting started. This step is recommended, but not mandatory.

To download Sample Data for your Magento web store:

1. Navigate to http://www.magentocommerce.com/download and log in to display the following page or go to http://www.magentocommerce.com and select the **Downloads** tab from the menu to display the following page:



__Note:__ This page will appear slightly differently on the web after a newer version is released.

2. Select a format for downloading **Sample Data**. Multiple compressed formats are provided. If you are unsure of which version to download, then use the .zip format, as shown above.

3. Click the **Download** button and save the file to the location of your choice.

Step 3: Uploading to Your Server

After you have downloaded the Magento downloader and Magento Sample Data, you must upload these packages to your server.

To upload to your server:

1. The file names are: **magento-downloader-x.x.x.zip** for the Magento downloader and **magento-sample-date-x.x.x.zip f**or the Magento Sample Data. Extract (unzip) the files to a directory of your choice.
2. Use your favorite FTP/SFTP program to copy the contents of the **`magento`** folder from the Magento downloader package to the server's root WWW directory (which is usually named **`public_html`**) or any other subdirectory of your choice, such as **/store**.
3. If you would like to add sample images to the sample products in your store, copy the contents of the **Media** folder from the **Sample Data** package onto the new **Media** folder on your server. This step is optional and only necessary for seeing product photos that represent each one of the sample products.

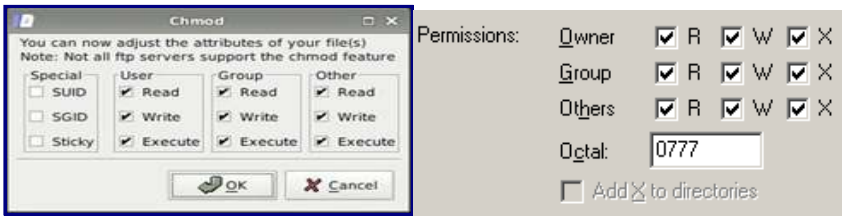
Step 4: Granting File Access Permissions

The top-level Magento directory on the server (the directory to which you uploaded the decompressed files) and all Magento directories under it must have the correct permissions in order for the Magento Installer to operate properly.

To grant file access permissions:

1. Navigate to your Magento directory on the server using your FTP/SFTP client.
2. Use the **Change Permissions** or the **Change Mode** function of your FTP/SFTP client to grant permission to the web server to write to these files and folders. There are two typical ways of representing file permissions in Linux:
   - As a number (for example, 755)
   - As a series of permissions categorized into user, group or other

   If your FTP client uses the first representation (as a number), set the permissions on the directory to **777** or **0777.** If your FTP client uses the second representation, set the permissions as shown in the image below.



   Ensure that you select the **Recursive** option in order to grant all subdirectories the proper permissions.

   Note: *Some servers have the correct permissions already set and, therefore, no changes need to be made in this case.*

Step 5: Setting Up the Web Store Database

To create and setup the database to be used by your web store:

1. Use a database management application, such as **phpMyAdmin** or a tool provided by your hosting provider to create a new database and to assign users and permissions to it.

2. Import the file **magento_sample_data_for_1.2.0.sql** using **phpMyAdmin** into this new database. This step is only required if you want to install Sample Data as recommended previously.

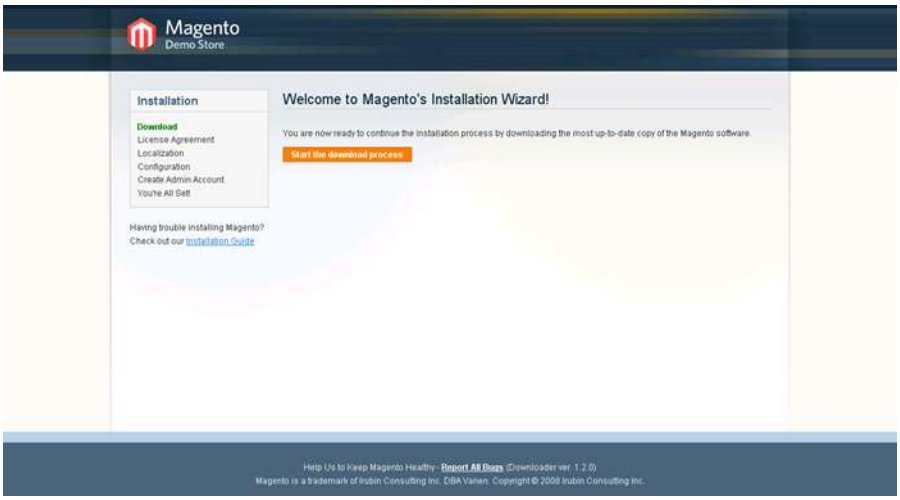
> ***Tip:*** *If you are unsure of how to proceed with this installation, you may refer to our professional installation service for help at* *http://www.magentocommerce.com/store/professional-magento-installation*.

You are now ready to install Magento!

Step 6: Installing Magento

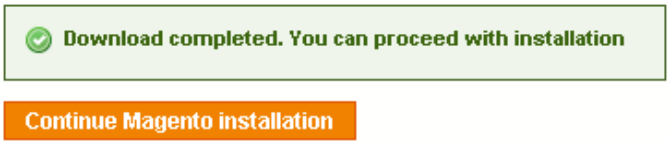
To install Magento:

1. Use a standard web browser to navigate to your server. If everything has been set up correctly as described up until now, the Magento Installation Wizard Welcome page is displayed, as shown below:



If error warnings are displayed, handle the errors before proceeding and then reload this page.

2 Click **Start the download process** and wait until Magento downloads all of its code. After this is completed, the following message is displayed at the bottom of the page:

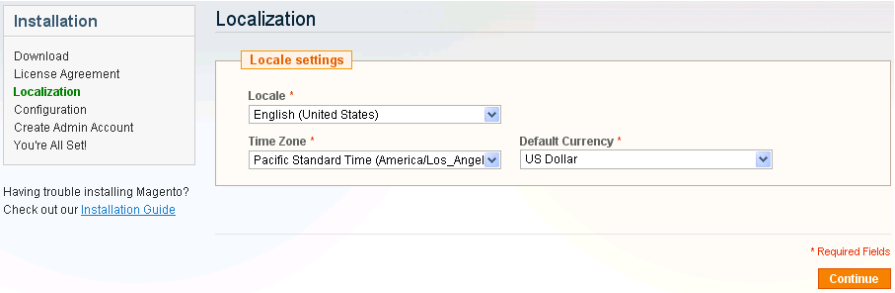


Note: If you were unable to complete the download process through this interface due to a connection error, try to upload the Full Magento Package from the Community download page.

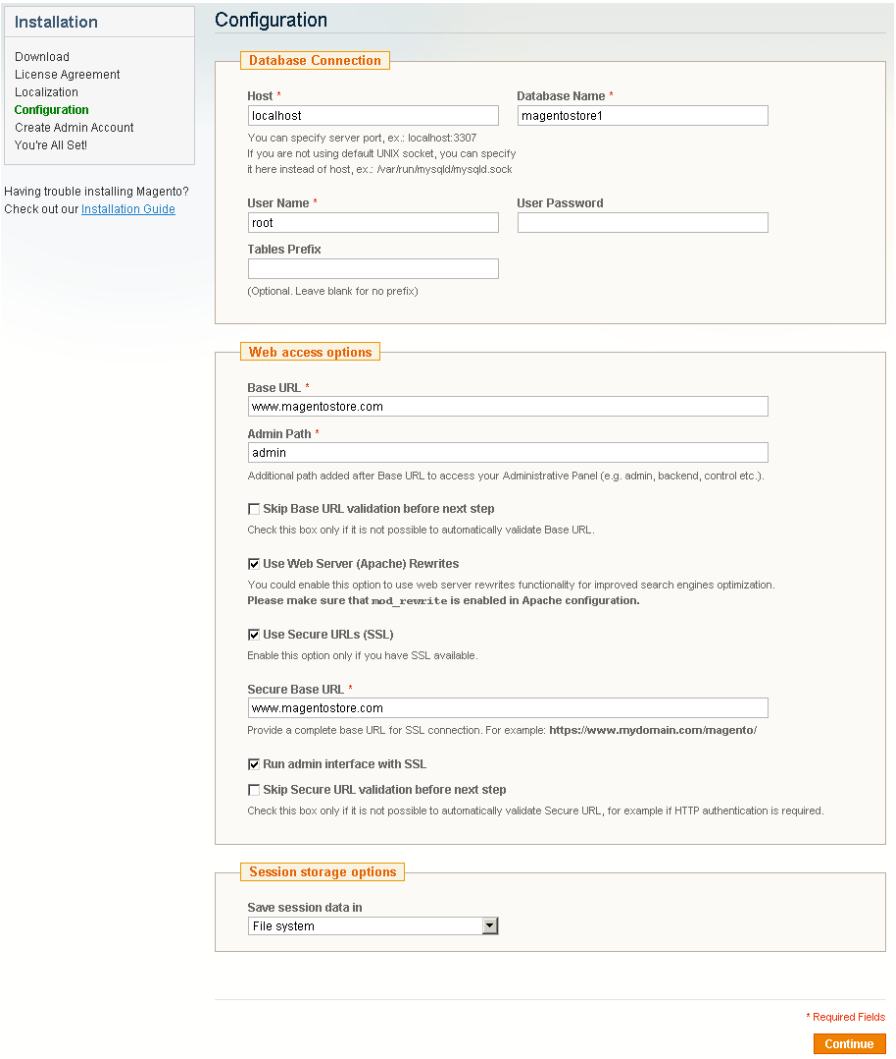
3 Click **Continue Magento installation** to proceed.

4 Read and agree to the terms of Magento's license. More information is provided about this subject in the *Magento License* section on page 11.

5 Click **Continue** to display the first of Magento's configuration pages, as shown below. Select your preferences and continue to the next page.



6 Change the default values according to your requirements and database information and click **Continue** to display the following page:



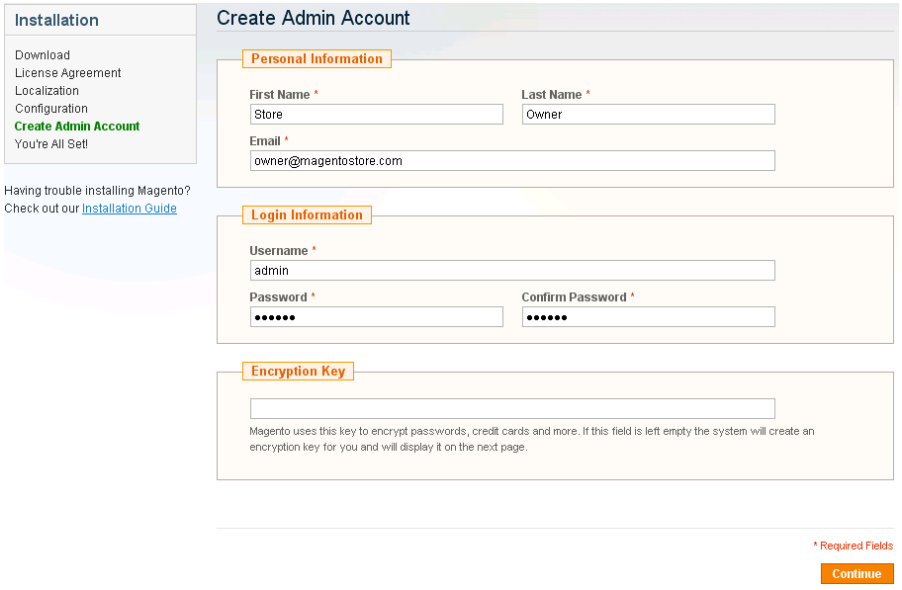
7 We strongly recommend setting the following options if your server has an SSL certificate installed:

- Use secure URLs (SSL)
- Run the admin interface with SSL

We also recommend setting the Use Web Server (Apache) Rewriters.

The first two options make purchasing and administration more secure. Usually, you can leave the other options as they are.

8 Click **Continue** to display the next page, as shown below:



9 This page enables you to specify access information, as follows:

- Enter the administrator's name and email.
- Create a username and password.
- Leave the **Encryption Key** field empty to display the key, as shown below.

10 Click **Continue** to display the next page, as shown below:

***Tip:** Write down the encryption key in a safe place. If you need or want to move your store data to a new Magento site, you will need this encryption key to recover the encrypted data.*

Congratulations! You have now completed the installation of Magento!

You can visit your new Magento storefront by selecting the **Go to Frontend** button or by typing the URL of your store in the browser.

You can also access the administration backend and begin configuring your new web store, as described in the *Accessing the Backend* section on page 41.

Tip: *You can easily open the backend by clicking the* ***Go to Backend*** *button on the last page of the Magento Installation Wizard, shown above. We recommend that you bookmark this page for easy access.*

Tip: *The process described above sets you up with a single website, single store and three store views for different languages. This is most probably all you need. However, if you would like to create a more sophisticated web store with multiple options, then you may refer to http://www.magentocommerce.com for more information.*

Basic Configuration

The following describes how to configure the basic information for your web store. The other aspects of your web store to be configured are described in the subsequent chapters of this guide.

Launch the backend and log in, as described in the *Accessing the Backend* section on page 41. Perform each of the following steps:

HTML Head

To define general page features:

1. From the **System** menu, select the **Configuration** option to display the configuration page.

   This page enables you to configure various aspects of the store. The left menu provides sections, such as **General**, **Catalog**, **Customers**. Clicking on each subsection in a section shows a set of tabs in the center of the page. You can expand or hide each of the tabs by clicking on them.

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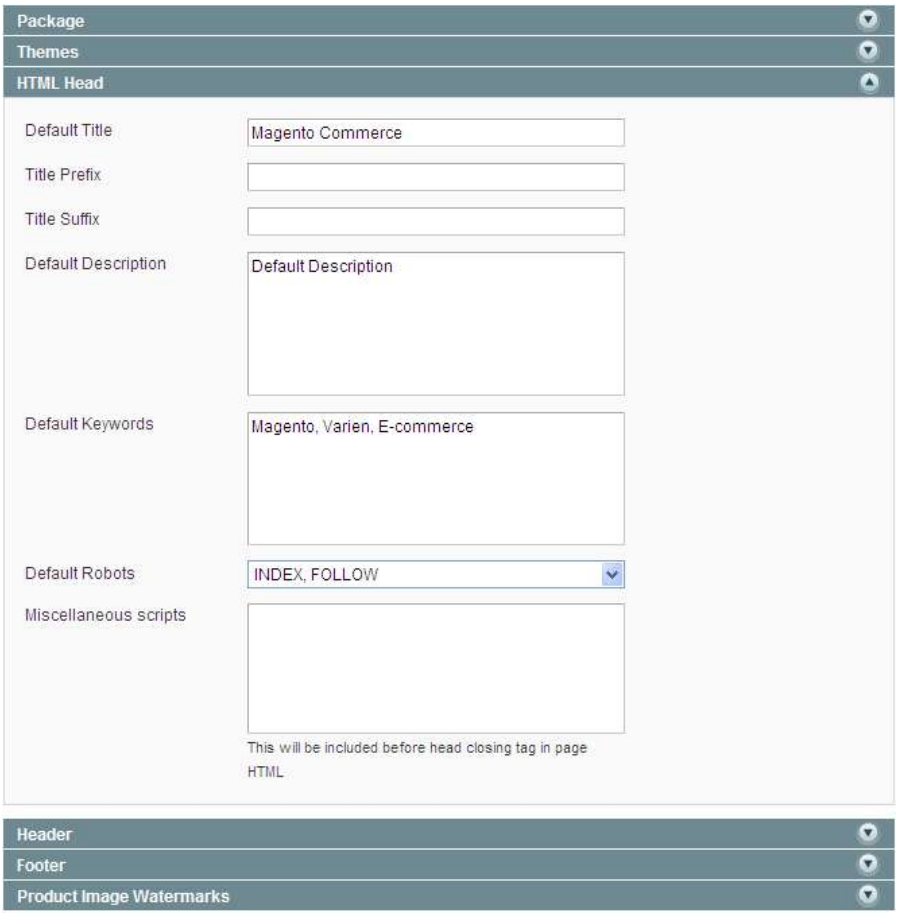
2 In the panel on the left, select the **Design** option under **General** to display the following:

3 Select the **HTML Head** option to expand the page to display the following:



4 In the **Default Title** field specify the browser title to appear in the pages of your web store that do not have their own title. This information is also used to improve search engine visibility and performance.

5 Specify a prefix and a suffix to be appended to the pages of your web store that have their own title, such as a prefix of **My Web Store**.

6 In the **Default Description** and **Default Keywords** fields specify words that describe your web store to be used by search engines when page-specific information is not provided. Keywords must be separated by commas.

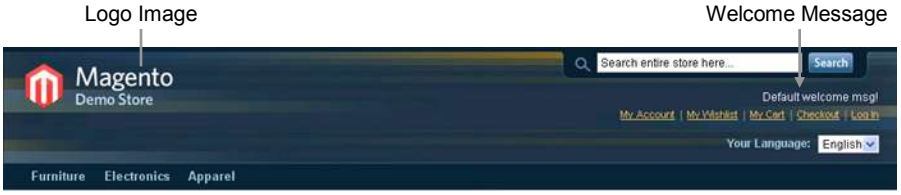
7 Click the **Save Config** button on the top right of the page.

Header

To define the header of each web store page:

1 Select the **Header** option to expand the page to display the following:

2 In the **Logo Image** field, specify the logo to appear on the top left of each page of your web store, as shown below for the Magento Demo Store. Make sure that you name your logo something other than **logo.gif,** so it does not get overwritten in future upgrades.



__Note:__ You will need to upload the image file using an FTP client to the __skin/frontend/default/default/images/__ directory or to your own skin folder in your Magento installation.

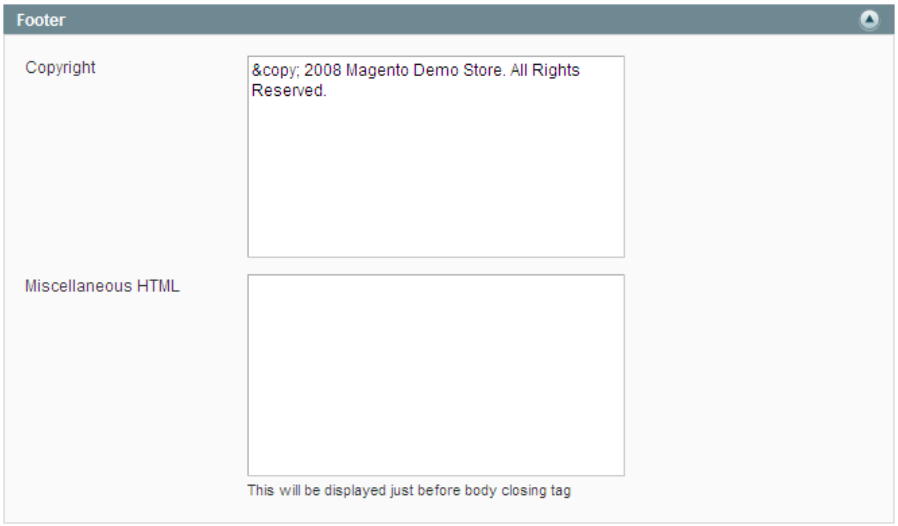
3 In the **Logo Image Alt** field, specify the alternative text to be displayed when you hover over the Logo Image in your web store.

4 In the **Welcome Text** field, specify the welcome message to be displayed on the top right of your web store for customers that are not logged in, as shown above.

Footer

To define the footer of each web store page:

1. Select the **Footer** option to expand the page to display the following:



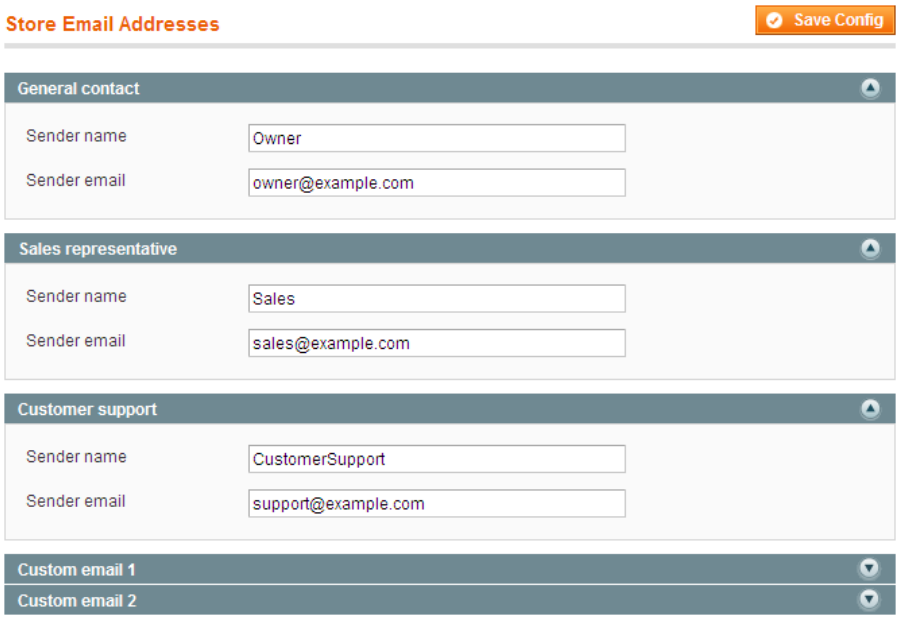
2. In the **Copyright** field, specify your web store's copyright information.

3. In the **Miscellaneous HTML** field, enter the HTML code to be shown just before the end of page. This area is usually used for adding tracking scripts that track your customers' activity on the site.

Web Store Emails

To define web store email addresses:

1 Select the **Store Email Address** option in the panel on the left to display the following page:



This page shows the various email addresses used for sending emails from your web store to your customers.

2 In each **Sender Name** field, specify the name of the sender or department from which the emails are sent.

3 In the **Sender Email** field specify the email address used for sending the emails.

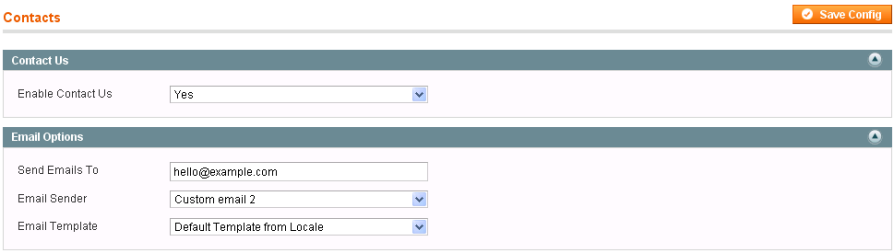
__Note:__ You may refer to the __Customizing Transactional Emails__ section on page 147 for more information about emails.

Contacts

The following describes how to define the email to which customers send requests when using the **Contact Us** option at the bottom of the page of your web store.

To define your web store contact information:

1. Select the **Contacts** option in the panel on the left to display the following page:



2. In the **Send Emails To** field, specify the email that is used for receiving feedback when a Customer uses the **Contact Us** option in the store.

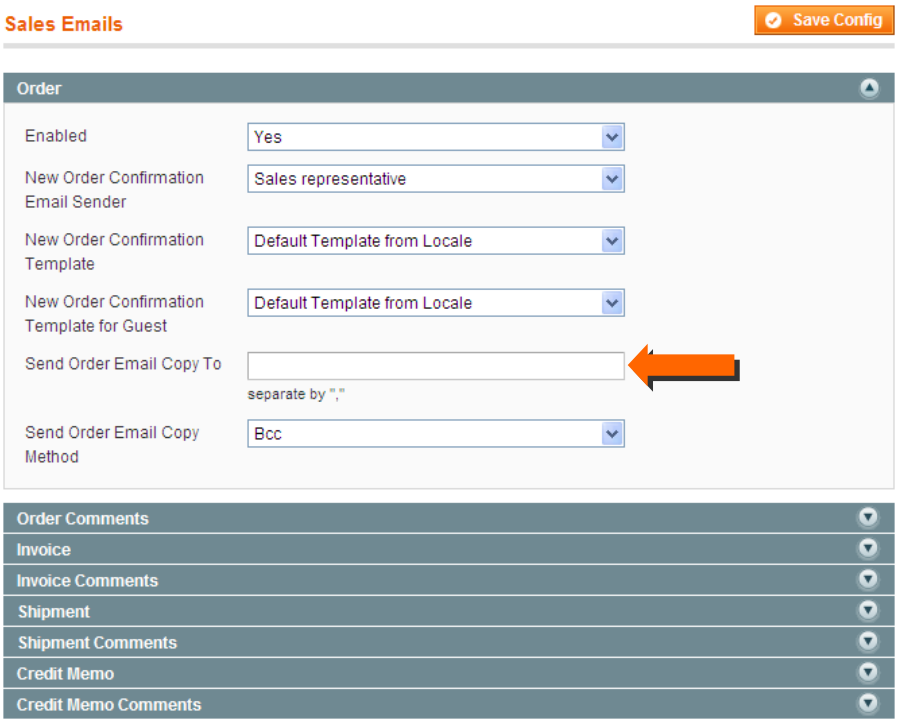
3. You may use one of the emails as defined in the **Store Web Addresses** page as described above, as the email sender information.

Sales Emails

To get a copy of sales emails sent to customers:

1. In the panel on the left, select the **Sales Emails** option under the **SALES** Category.

2. Select the **Order** option to expand the page to display the following:



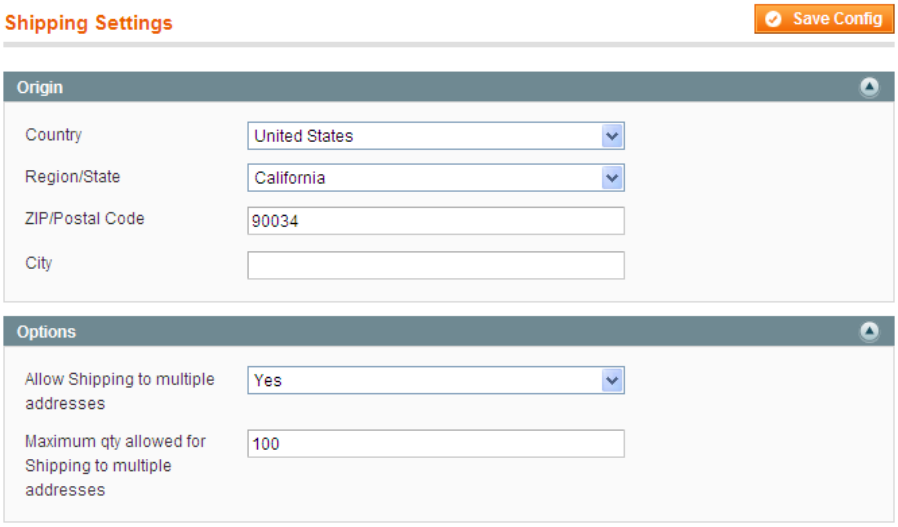
3. In the **Send Order Email Copy To** field, specify the email to which a copy of the Order confirmation email is sent. This helps you to keep track of the new Orders that come in.

Shipping Settings

This section describes how to specify shipping options, such as: origin used for shipping rate calculation or to enable/disable the multiple shipping destinations feature.

To define shipping options:

1. In the panel on the left, select the **Shipping** option.
2. Select the **Shipping Settings** option to expand the page to display the following:



3. Configure the options to match your store.

This page was intentionally left blank.

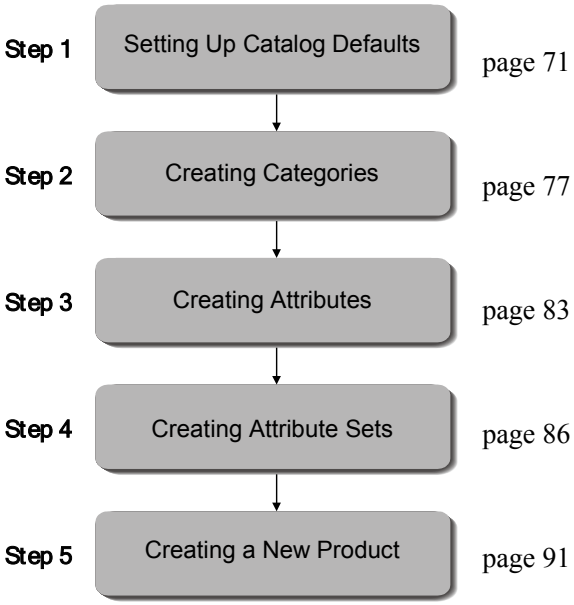
5 Setting Up Your Catalog

This chapter describes how to create a catalog for your Magento web store, how to add products and how to define their Attributes. This chapter contains the following sections:

- **Overview,** page 70
- **Setting Up Catalog Defaults,** page 71
- **Managing Categories,** page 76
- **Managing Product Attributes,** page 81
- **Creating Attribute Sets,** page 86
- **Managing Products,** page 90

Overview

The best workflow for creating your products is as follows:



The following describes the above process:

- **Step 1: Setting Up Catalog Defaults,** page 71. This step describes how to set basic Catalog defaults that define its behavior.
- **Step 2: Creating Categories,** page 77. The first step is to create the Categories that will contain your products. Each product can be assigned to one or more Categories.

  A Magento store with Sample Data provides three such Categories: **Furniture**, **Electronics** and **Apparel**. Categories may have Sub-Categories. A customer can click on a Category to see a dropdown menu of Sub-Categories of products, such as **Cell Phones**, **Cameras** and **Computers**, as shown below:

- **Step 3: Creating Attributes,** page 83. Next, you can create the Attributes that represent a product's characteristics. Attributes are a powerful Magento concept to make finding and comparing products easier.

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- **Step 4: Creating Attribute Sets,** page 86. Attribute Sets are logical groups of Attributes that simplify the process of assigning Attributes to a product. They do not appear in the front-end user interface.
    - **Creating a New Attribute Group,** page 89. Part of the process of creating an Attribute Set is to create Attribute Groups. These Groups determine how Attributes appear in the backend when defining a product.
- **Step 5: Creating a New Product,** page 91. This step shows how to fill in product information in order to maximize conversion and how to assign Categories to help customers navigate to the products of interest to them. Attribute Sets and Attributes are assigned to products to describe them, provide multiple options and also help the user search through the product list.

Setting Up Catalog Defaults

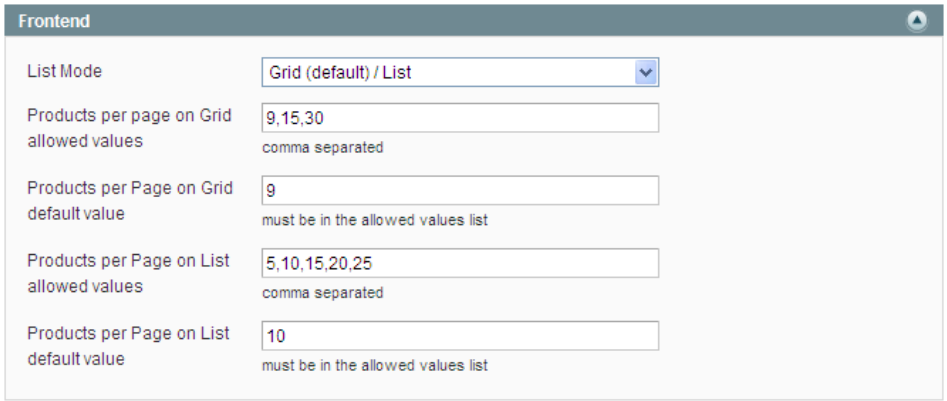
The first step to creating your catalog is to configure the catalog system settings.

To configure catalog defaults:

From the **System** menu, select the **Configuration** option and then from the **CATALOG** area select the **Catalog** option. The following describes some of the more important sections in the page.

Frontend

This section determines how your products are shown in the frontend catalog pages.



- **List Mode**
    - **Grid Only**: The products are only displayed in a grid structure.
    - **List Only**: The products are only displayed in a list.

- **Grid (Default)/List**: The products are displayed in a grid structure by default, but your customers are able to switch to list.
- **List (Default)/Grid**: The products are displayed in a list structure by default, but your customers are able to switch to grid.

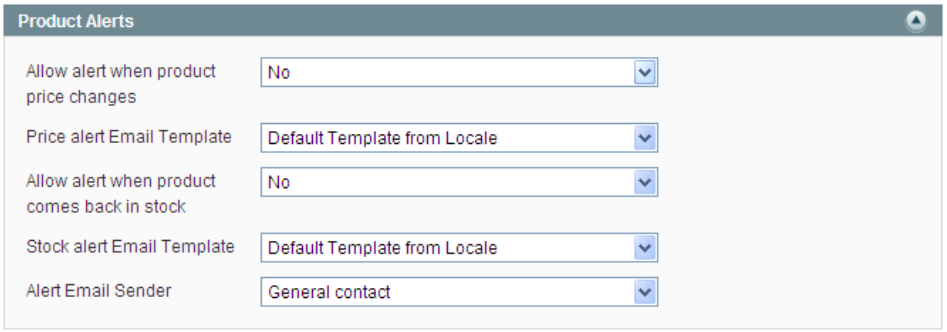
- **Products per Page:** Choose whether the Category pages display 9, 15 or 30 products by default. In the frontend, your customers will be able to choose between these options or display All Products.

Product Reviews

This section enables unregistered guests in your store to write product reviews. You should disable this setting if you expect or experience inappropriate reviews being posted.

Product Alerts

You can allow your customers to subscribe to two types of customer alerts by email. Each alert has its own enable dropdown and email template, but they share the same email sender. For more information on how to configure email templates and email sender addresses, you may refer to the *Customizing Transactional Emails* section on page 147 for more information.



The Price Alert creates a link called **Sign up for price alert,** in every product page. Clicking this link subscribes your customers to this alert so that they receive an email each time the product price is changed. This includes adding or changing **Special Prices** in addition to the regular **Price** field.

The Stock Alert creates a link called **Sign up to get notified when this product is back in stock** in every **Out of Stock** product. Clicking this link subscribes your customer to this alert so that they receive an email when the product status changes to **In Stock**.

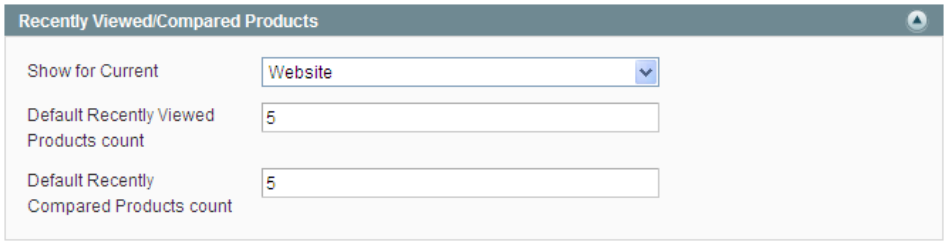
For each product, there is a tab listing all the customers subscribed to either of these alerts.

Product Image Placeholders

This section enables you to specify an image for each of the sizes that are used instead of the product image, if it is missing.

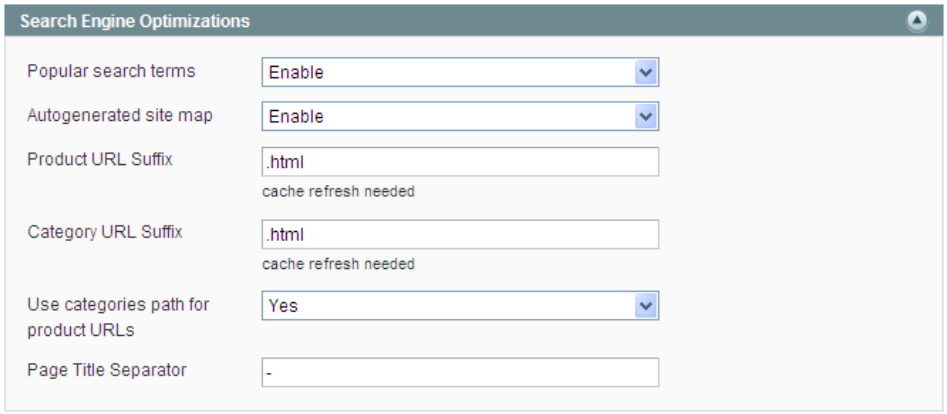
Recently Viewed/Compared Products

This feature is described in detail in the *Recently Viewed* section on page 24. The configuration section enables specifying how many products are shown.



Search Engine Optimizations

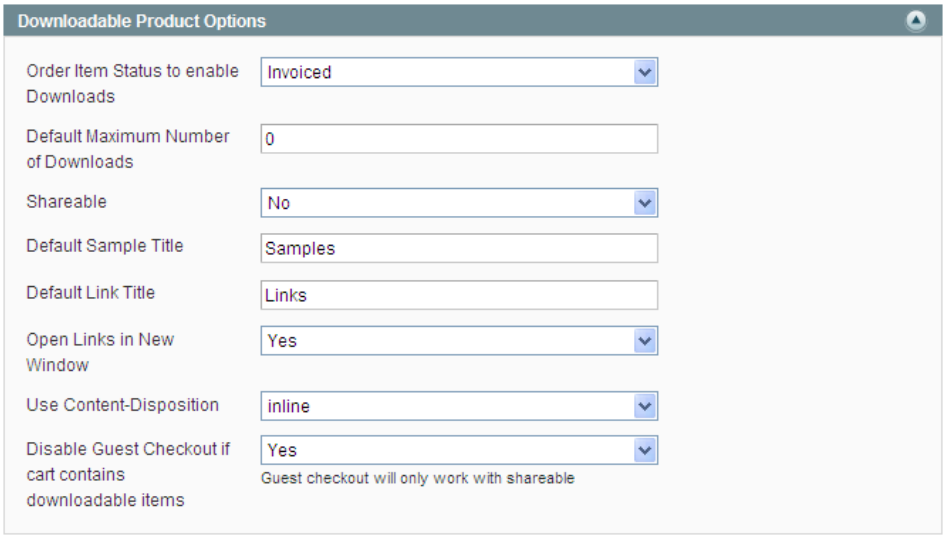
In order to make your site more search engine friendly configure the following:



- **Popular Search Terms:** Enable this feature to display a **Search Terms** link in the footer of the frontend pages. This enables customers to link to a list of all search terms. This is an SEO (Search Engines Optimization) feature because each of these search terms counts as a link to your site and is explored by search engines to discover content on your site.
- **Auto generated Site Map: Enable** this feature to display a **Site Map** link in the footer of the frontend pages. This enables a customer to link to an automatically generated site map including a list of all of your existing Categories. In addition to the Auto generated site map, Magento enables integration with Google Sitemap. More information is provided in the following pages.
- **Use Categories Path for Product URLs:** This option determines how the URL is composed. Select **Yes** to specify that the URL links for products includes the associated Category and a separate link is generated for each associated Category. Select **No** to specify that the URL Rewrites include only the product name and that there is only one link, regardless of how many Categories with which the product is associated.

Downloadable Products Options

This section controls the setting for products of Downloadable type. The most important settings are:



- **Order Item Status to enable Downloads:** Controls whether customers can access their downloadable product links immediately after the order is placed or only after the order status is changed by the store admin.

- **Shareable:** Setting this option to **Yes** enables non-registered customers to access their downloads. This is the only option for customers to access their products if you want to offer guest checkout or quick checkout methods, such as PayPal Express or Google Checkout. This setting can be changed when editing a product.
- **Disable Guest Checkout if cart contains downloadable items:** This setting disables the Guest Checkout option only if there are downloadable items in a cart and leaves it enabled if a customer is purchasing other products.
- **Default Sample Title and Default Link Title:** These settings control what is throughout the store when referring to samples and downloadable products (links).

Managing Categories

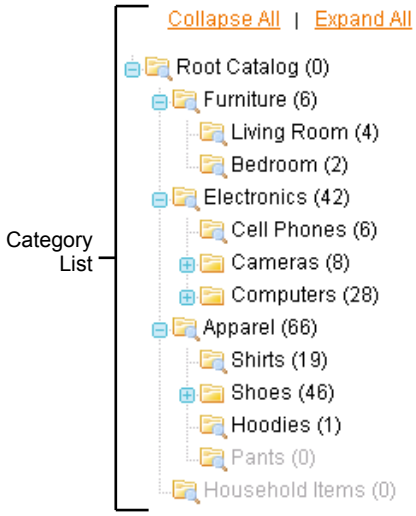
In this section, you will learn how to display, create and edit Categories and Sub-Categories.

The products in the web store are grouped into Categories, which are shown in a bar near the top of the store web page when the default theme is used. Each product can be assigned to one or more Categories, as described in the *Finding the Right Products* section on page 16.

Displaying Categories

To display a list of all defined Categories:

From the **Catalog** menu, select the **Manage Categories** option. The following shows an example of a list of Categories:



The Categories are shown in a tree on the left. If you have loaded Sample Data, these sample Categories (Furniture, Electronics and Apparel) will appear in the Category tree. Disabled Categories appear grayed out.

Creating Categories

This section describes the most important features in creating a Category.

To create a new Category:

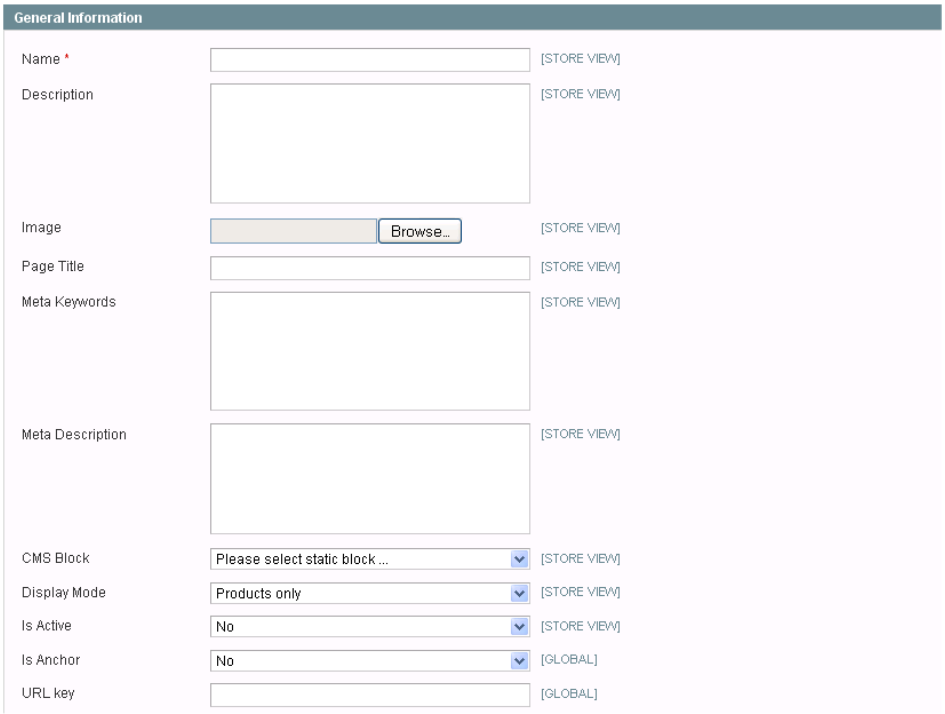
1. Select a branch in the Category tree. If this is a top level Category, then select the root of the tree called **Root Catalog**. If you want to define a Sub-Category, then select the branch of the Category to which it belongs.

2. Click the **Add New Category** button. Three tabs of information are provided to describe this Category: **General Information**, **Category Products** and **Custom Design**.

   Mandatory fields appear with a red asterisk (*).

General Information Tab

Most of the fields in this page are self-explanatory. In this tab, you are asked to provide a Category name, description, image (used to represent your category) as well as Meta keywords and description for better search engine positioning.



1. In the **CMS Block** field, select the CMS block that you would like to be shown for this Category. This block must first be created in the CMS section.

2. In the **Display Mode** field, select one of the following options to specify how you would like your category listing page to appear:
   - **Static block only**
   - **Static block and product list below it**
   - **Product list only**
3. Set the **Is Active** field to **Yes** to specify that this Category appears in the store.
4. In the **Is Anchor** field, select **Yes** to specify that this Category page is an anchor. Anchors are used for the Layered Navigation in Magento, as described in the *Layered Navigation* section on page 79.

   If you set the Category to be an anchor for Layered Navigation, then your web store displays the Sub-Categories of this Category in the **SHOP BY** panel on the left. This area also shows a linked list of the filterable Attributes of the products in this Category and its Sub-Categories.

   The following shows the **SHOP BY** panel for the Apparel Category which is set as an anchor.

Catalog Products Tab

This tab enables you to specify the products that belong to this Category. Check the relevant check boxes. You can use filters to limit the products that are shown. Use the **Reset Filter** button to show all products. You can also assign products to Categories when editing products.

- Click the **Save Category** button on the top right of the page. You may need to refresh the page to display the Category or Sub-Category in the tree.

***Advanced Tip:** The **Custom Design** tab provides special options for advanced category design changes..*

Editing Categories

To edit a Category:

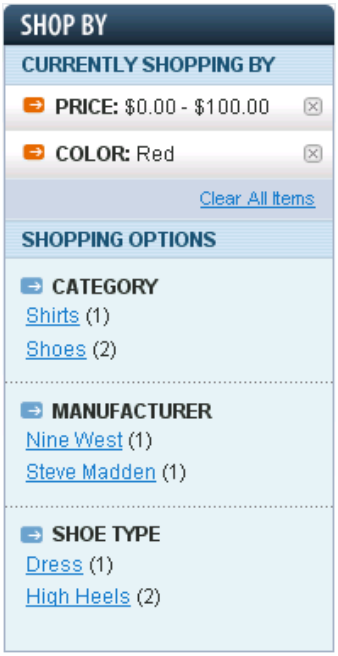
Click on a Category in the tree, edit its information and click **Save Category**.

Layered Navigation

What is Layered Navigation?

Of course, you want the customers browsing through your site to find the products that interest them in the fastest possible way. Otherwise, your sales opportunities are lost. When a customer is confronted with a Category containing 60 products spread across multiple pages, most customers simply leave the site when they cannot find what they need on the first page. Magento enables you to provide customers with the option to find the products that they want by making a selection from a variety of filters, such as price, manufacturer or any other aspect of the products, as shown below. Layered Navigation information is shown on category listing pages while searching for products. Show your customers what they want and you will raise conversions!

The following example shows an enabled layered navigation filter by PRICE range and COLOR.



Default Layered Navigation

In Magento, two properties appear as navigation filters by default: **PRICE** and **CATEGORY**.

- **PRICE:** Price ranges are selected logically in order to provide another filter for navigation. The ranges themselves are determined by the prices of products contained within them. There are never more than ten price ranges displayed at a time and products are distributed accordingly.
- **CATEGORY:** If you define a Category as an **Anchor Category,** its Sub-Categories are displayed as layered navigation options. This is defined in the **Is Anchor** field in the **Catalog** menu ➔ **Manage Categories** option, as described on page 76. The image above shows that the first filter is **CATEGORY** and it features two options: Shirts and Shoes. In this example, Shirts and Shoes are Sub-Categories of the Category represented by this layered navigation block.

Defining Layered Navigation Filters

The additional filters in the screenshots above are **Manufacturer** and **Shoe Type**. These are product Attributes that have been selected as filterable. This is defined in the **Use in Layered Navigation** field in the **Catalog** menu ➔ **Attributes**, as described on page 83.

There are two types of filterable Attributes, as follows:

- **Filterable (with results):** Means that links only appear for values where the number of results (the number in parentheses next to each value) is greater than zero.
- **Filterable (no results):** Means that links appear for all values, whether the number of results is zero or greater.

In order for an Attribute to appear as a layered navigation filter, the **Catalog Input Type for Storeowner** must be **Dropdown**, **Multiple Select** or **Price**. This controls the number of possible filter options and makes them consistent.

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Managing Product Attributes

What is an Attribute in Magento?

An Attribute represents a property of a product, such as: its name, image, SKU, color, manufacturer and so on. Although this may seem a bit abstract, it is also one of the most powerful concepts in Magento and provides an almost limitless ability to control the products. Attributes enable you to add new product properties without having to write a single line of code or to add any columns to your database. Understanding attributes is crucial for making your store easy to use for customers.

Attributes are assigned by you to the products of your choice in order to enable your customers and search engines to find them more easily. Your Magento web store automatically displays products according to their Attributes, for easy accessibility by your customers, in the **SHOP BY** layered navigation panel on the left of your web store, as shown below:

Attributes also determine which products are displayed when a customer performs a search for a keyword.

Attributes called **System** define the properties that are required by the store to function properly.

The page above shows **PRICE** range Attributes, **COLOR** Attributes, **MANUFACTURER** Attributes and **SHOE TYPE** Attributes. Each of these Attribute Groups contain Attributes, and each Attribute is presented as a link. When a customer clicks on an Attribute link, a list of products that have that Attribute is displayed. You may refer to the *Filtering the Display of Products* section on page 18 for more information about how this feature appears to the customers that visit your web store.

A web storeowner can add as many additional Attributes as desired. In the Magento backend you can define Attributes in Sets. This eases the definition process so that similar products can be created with the same Attributes. The Attribute Sets function enables you to assign multiple Attributes to a product at one time by assigning an entire Attribute Set to a product.

If a store sells TV's, shoes, books and power tools, then four Attribute Sets could be defined: one specific to TV's, one for shoes, one for books and one for power tools. When a new power tool product is added to your catalog you can simply select the Power Tool Attribute Set to add the relevant Attributes to this product.

You should first define Attributes, then define Attribute Sets and then assign the relevant Attributes to Attribute Sets, as described below.

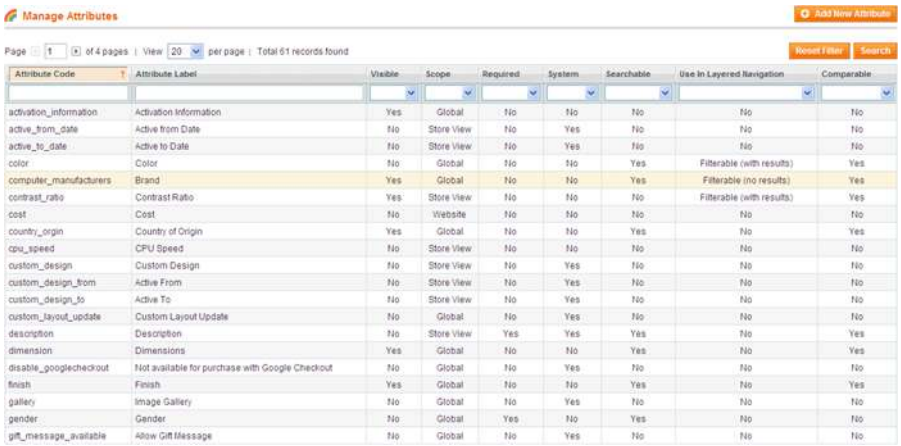
Creating Attributes

Attributes must be defined before defining Attribute Sets and products.

Note: *Only Attribute Sets can be assigned to a product (not Attributes).*

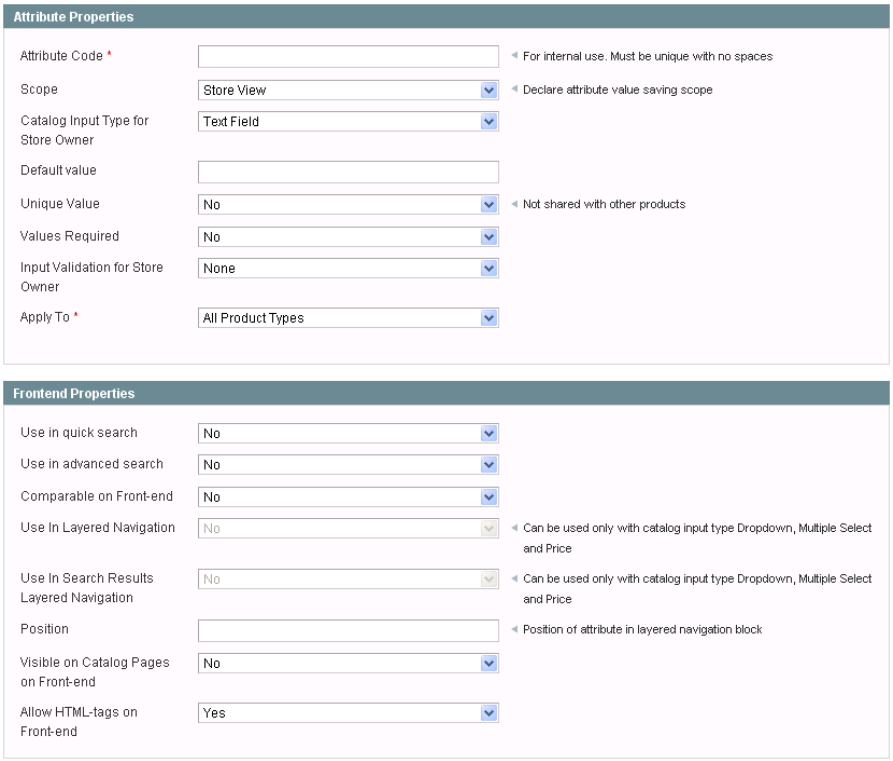
To define Attributes:

1 From the **Catalog** menu, select the **Attributes** option and then the **Manage Attributes** option. A list of existing Attributes is displayed, as shown below:



Attribute Code	Attribute Label	Visible	Scope	Required	System	Searchable	Use In Layered Navigation	Comparable
activation_information	Activation Information	Yes	Global	No	No	No	No	No
active_from_date	Active from Date	No	Store View	No	Yes	No	No	No
active_to_date	Active to Date	No	Store View	No	Yes	No	No	No
color	Color	No	Global	No	No	Yes	Filterable (with results)	Yes
computer_manufacturers	Brand	Yes	Global	No	No	Yes	Filterable (no results)	Yes
contrast_ratio	Contrast Ratio	Yes	Store View	No	No	No	Filterable (with results)	Yes
cost	Cost	No	Website	No	No	No	No	No
country_orgin	Country of Origin	Yes	Global	No	No	Yes	No	Yes
cpu_speed	CPU Speed	No	Store View	No	No	No	No	No
custom_design	Custom Design	No	Store View	No	Yes	No	No	No
custom_design_from	Active From	No	Store View	No	Yes	No	No	No
custom_design_to	Active To	No	Store View	No	Yes	No	No	No
custom_layout_update	Custom Layout Update	No	Global	No	Yes	No	No	No
description	Description	No	Store View	Yes	Yes	Yes	No	Yes
dimension	Dimensions	Yes	Global	No	No	Yes	No	Yes
disable_googlecheckout	Not available for purchase with Google Checkout	No	Global	No	Yes	No	No	No
finish	Finish	Yes	Global	No	No	Yes	No	Yes
gallery	Image Gallery	No	Global	No	Yes	No	No	No
gender	Gender	No	Global	Yes	No	Yes	No	No
gift_message_available	Allow Gift Message	No	Global	No	Yes	No	No	No

2 Click the **Add New Attribute** button to display the following page in which you can define a new Attribute.



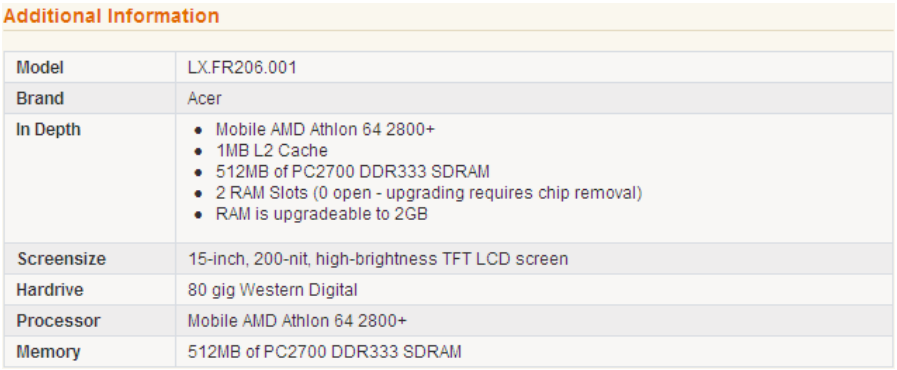
3 In the **Attribute Code** field, specify a unique identifier for this Attribute. Do not use spaces. This name does not appear in the web store interface shown to customers.

4 In the **Scope** field select the **Global** option.

5 In the **Catalog Input Type for Storeowner** field, select **Dropdown**. This setting controls how a store administrator can enter values for attributes. For descriptive textual Attributes, you can use the **Text Field** or **Text Area** types, for list prices you can use the **Price** type. However, not all types can be used for layered navigation.

6 In the **Use in Layered Navigation** field, select the **Filterable (with Results)** option so that the Attribute is shown only when there are products that use it.

7 In the **Visible on Catalog Pages on Frontend** field, select **Yes** to specify that this Attribute appears in the **Additional Information** part of a products page in the web store, as shown below:



Additional Information

Model	LX.FR206.001
Brand	Acer
In Depth	• Mobile AMD Athlon 64 2800+ • 1MB L2 Cache • 512MB of PC2700 DDR333 SDRAM • 2 RAM Slots (0 open - upgrading requires chip removal) • RAM is upgradeable to 2GB
Screensize	15-inch, 200-nit, high-brightness TFT LCD screen
Hardrive	80 gig Western Digital
Processor	Mobile AMD Athlon 64 2800+
Memory	512MB of PC2700 DDR333 SDRAM

Select other options to suite your requirements:

Selecting the **Use in Quick Search** or the **Use in Advanced Search** options causes this Attribute to be searchable in the store.

The **Comparable on Front-end** field specifies that this Attribute will appear in the compare window when products are compared.

8 Select the **Manage Labels** button on the top left of the page to display the following page:

9 Click the **Add Options** button and then enter a value that can be selected for this Attribute which will appear in the web store in the **SHOP BY** panel. For example: if you defined an Attribute called **Collar Type**, then its values can be **Flat** and **Standing**. Use the **Add Options** button for each Attribute value to be added. In this case, you would use it twice, once for **Flat** and once for **Standing**, as shown below:

> ***Note:*** *If your web store works with multiple languages, then enter the Attribute in each language. If you do not enter a value of a specific language, the Magento uses the default language. The Magento Demo Store is a multi-language web store. However, this guide does not describe how to define multi-language web stores.*

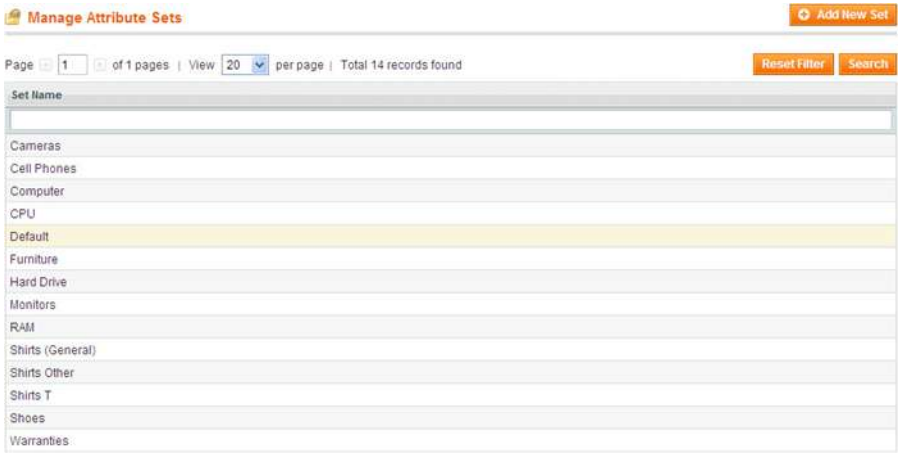
10 Click **Save Attribute**.

Creating Attribute Sets

Attribute Sets contain a set of Attributes. Only Attribute Sets can be assigned to a product (not Attributes). If you would like to add a small number of Attributes, you can add them to the Default set, but if you want to add Attributes that will be applied only to a subset of products, it is advisable to create an Attribute Set for each set of Attributes that you would like to assign to products. Attribute Sets can inherit from each other, thus saving you from redefining sets of Attributes that apply to many different products.

To create a new Attribute Set:

1. From the **Catalog** menu, select the **Attributes** option and then the **Manage Attribute Sets** option. A list of existing Attribute Sets is displayed, as shown below:



Note: *The page above shows the Attribute Sets that are provided in Magento's Sample Data.*

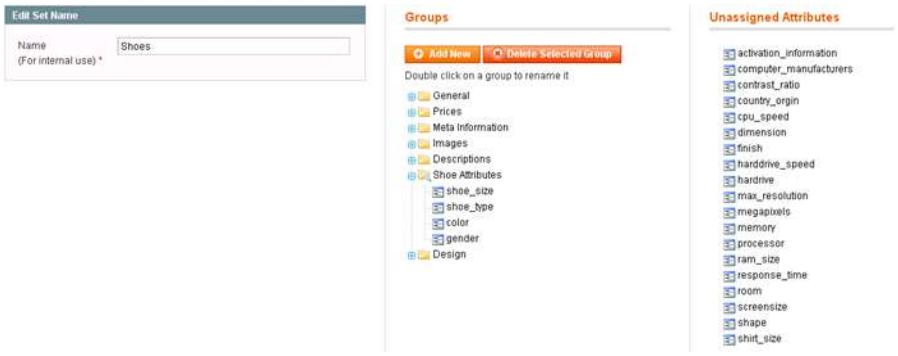
Note: *The Default Attribute Set is comprised mostly of system Attributes. This Attribute Set is typically inherited by all other Attribute Sets. System Attributes are indicated by an icon with an orange dot.*

2. Click the **Add New Set** button to display the following page in which you can define a new Attribute Set.

3. In the **Name** field, specify the name of this Attribute Set.

4 In the **Based On** field, select another Attribute Set from which this Attribute Set is to inherit. This enables you to reuse the Attributes already defined in a set to build other Attribute Sets. The simple option is to leave the **Default** option that appears in this field.

The following page is then displayed:



The top left of the page shows the name of the Attribute Set that you are defining.

The center of the page shows a hierarchical tree representing Groups of Attributes. You may refer to the *Creating a New Attribute Group* section on page 89 for a description of how to define Attribute Groups.

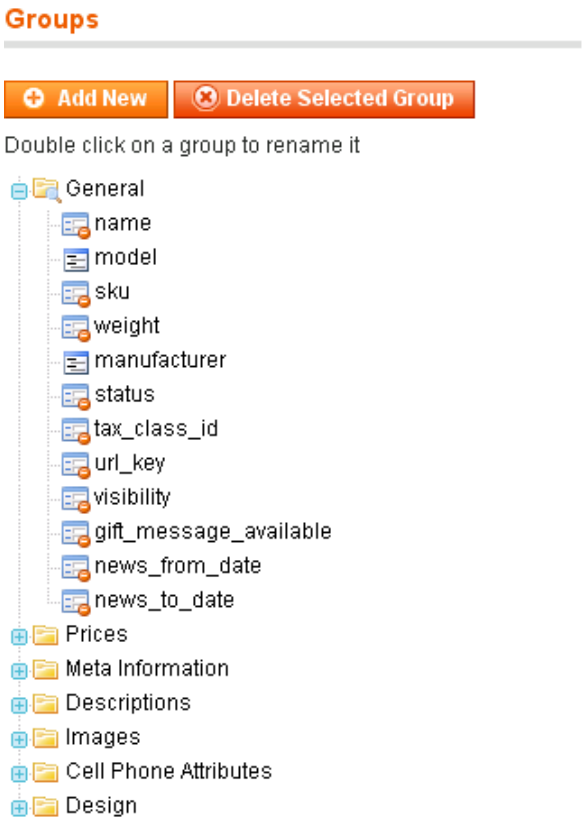
The right side of the page shows a list of Attributes defined in other Attribute Sets, not assigned to this Attribute Set.

5 Select the Attributes to be assigned to this Group by dragging them from the **Unassigned Attributes** area on the right into the relevant Group in the tree in the **Groups** area in the middle.

Creating a New Attribute Group

The center of the Attribute Set definition page shows a hierarchical tree representing Groups of Attributes.

These Groups determine how Attributes appear in the backend when a product is being edited. This enables a logical grouping of Attributes.



To define an Attribute Group:

1. Click the **Add New** button in the **Groups** area in the center of the page to display a popup window asking for the Group name.
2. Enter the name of the new Group and click **OK**.
3. Click and drag Attributes from the **Unassigned Attributes** area into the newly created group to assign them to this group.
4. You can also click and drag Attributes that are already assigned to move them between groups.

Managing Products

This section describes how to define and edit products.

Tip: *You should first define the Attributes of a product, as described in the* ***Managing Product Attributes*** *section on page 81, before you define products that have that Attribute.*

Product Types

Magento offers a variety of product types that enable significant flexibility when defining products. The following lists the available product types and their typical usage:

- **Simple Product:** This is the most basic product type. It is suitable for all kinds of physical (shipped) products.
- **Virtual Product:** This is a product that does not require shipping or inventory. It is generally used for warranties or services.
- **Downloadable Product:** This is a digitally downloadable product that sells one or more files of a product and provides samples of those files. These downloadable files can reside on your server or be provided as URLs to any other server.
- **Grouped:** This option enables you to display several similar products on a single page. For example, if you are selling chefs' knives and you have the same knife in four sizes, you can make a **grouped product** to display all four of these sizes. Customers can select the size(s) that they want and add them to the cart from this page.
- **Configurable:** This product enables your customers to select the variant that they want by choosing options. For example, you can sell T-shirts in two colors and three sizes. You would have to create six variants as individual products (each with its own SKUs) and then add these six to a **configurable product** where customers can choose the size and color, and then add it to their cart. A very similar functionality is possible by using Custom Options for Simple products. The difference between a configurable product and a product including custom options is that inventory is not checked or updated for individual options during the purchase of the latter and there is no possibility to go directly to a product with a given set of options. This also makes it hard for a search engine to find the product option.

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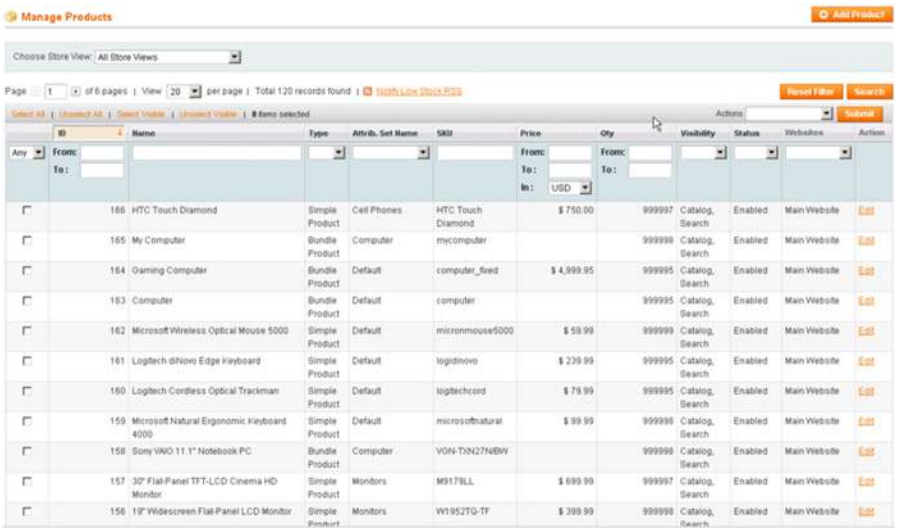
- **Bundle:** This product is comprised of components that are presented in different ways and are made from existing products. A good example of a bundle is a complete computer. For this computer, you can configure how much RAM or what kind of monitor is included with this computer in your store.

Creating a New Product

The following steps are the same for all product types. Subsequent sections describe the differences between each of the product types.

To create a new product:

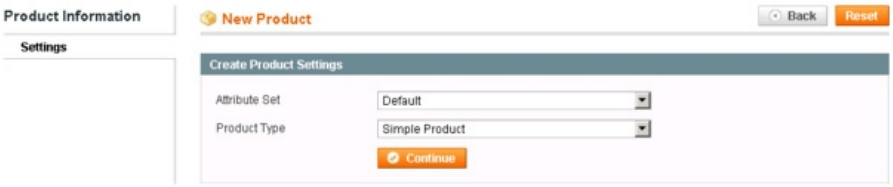
1 From the **Catalog** menu, select the **Manage Products** option to display a list of products, as shown below:



__Note:__ The page above shows the products defined in the Sample Data provided with Magento. If you downloaded Sample Data, as described in the __Step 2: Downloading Sample Data__ section on page __53__, then you may want to leave the products in for you to refer to as examples and delete them later.

__Note:__ You can duplicate the definition of a similar product to create new products by editing the product and then clicking the __Duplicate__ button.

2 Click the **Add Product** button on the top right of the page to display the following page:



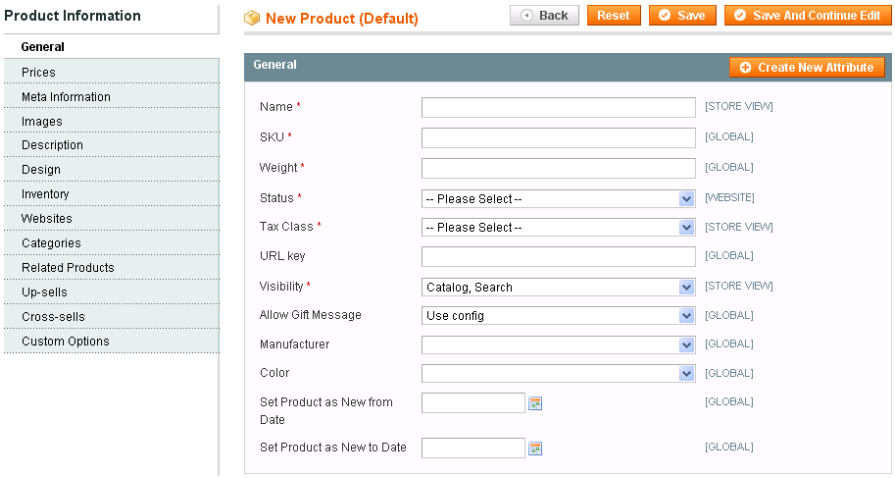
First Product Wizard Page

This is the first page of a product definition wizard that walks you through the process of defining a product.

1 In the **Attribute Set** field, select the Attribute Set that contains the Attributes that best describe this product. You may refer to the *Managing Product Attributes* section on page 81 for a description of how to define Attributes.

2 In the **Product Type** field, choose the type of product you want to create.

3 Click the **Continue** button to display a page similar to the one below (differences are due to the different product types that you may choose):



General Product Configuration Page

Fill in all the mandatory fields, which are indicated by a red asterisk (*).

- Set the **Status** field to **Enabled** to specify that the product is available in the store.
- Select a **Tax Class**. You may refer to the *Product Tax Class* section on page 124 for more information.

- Leave the default value in the **Visibility** field. It determines whether the product is displayed in the catalog pages and/or search results.

The following describes the other fields in this page:

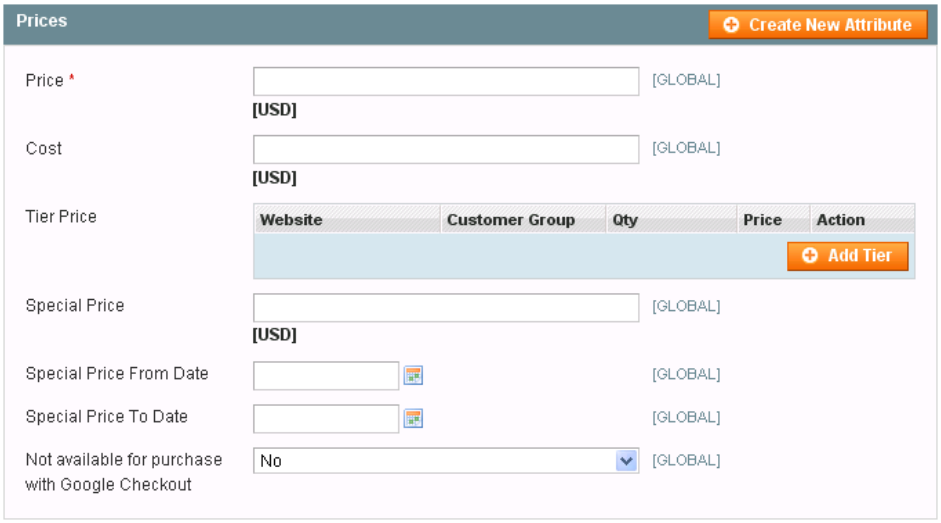
- **Name:** The product name as it appears in the frontend.
- **Description:** The description that appears in the center of the product page.
- **Short Description:** The description that appears at the top of the product page.
- **SKU:** The product's SKU. Magento uses SKU as a unique identifier for this product. SKU is global, meaning if you update the SKU for a product in one web store, it updates in all other web stores as well.
- **Weight:** The product's weight. This value is usually used for shipping calculations.
- **Set Product as New from/to Date:** The date range in which this product can be promoted as a new product in various locations throughout your site.
- **URL key:** The Search Engine Friendly URL Identifier is the name used for this product in the product's URL. You cannot use spaces in this field. If the URL key is left blank, one is automatically generated by Magento.
- **Allow Gift Message:** Determines whether customers are able to add gift messages to this particular product during checkout.

Note: *Additional fields may appear on this (and other pages) if you add Attributes to the Default attribute set or base the product on another Attribute Set. In the example on the previous page, the Manufacturer and Color Attributes were added to the Default set by the Sample Data that you downloaded.*

Note: *The* ***Create New Attribute*** *button opens a popup window that enables you to enter an Attribute to be added to the Default set. We recommend defining the Attributes structure first.*

Prices Product Configuration Page

Select the **Prices** option in the **Product Information** panel on the left to display the following page:



Fill in all the mandatory fields, which are indicated by a red asterisk (*).

This area enables you to enter the **Price**, **Cost** and **Special Price** information for this product. You can also add Tier Pricing, as described in the *Tier Pricing* section on page 169.

- The **Special Price** field is used for discounting or promotions, as described in the *Special Prices* section on page 167.
- The **Cost** field is only used in the backend. It can be used for generating revenue reports.

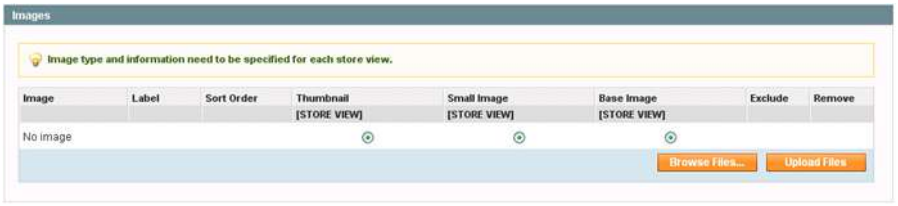
Meta Info Product Configuration Page

1 Select the **Meta Info** option in the panel on the left to display the following page:

2 Enter information that enables search engines to more easily find and index this product.

Images Product Configuration Page

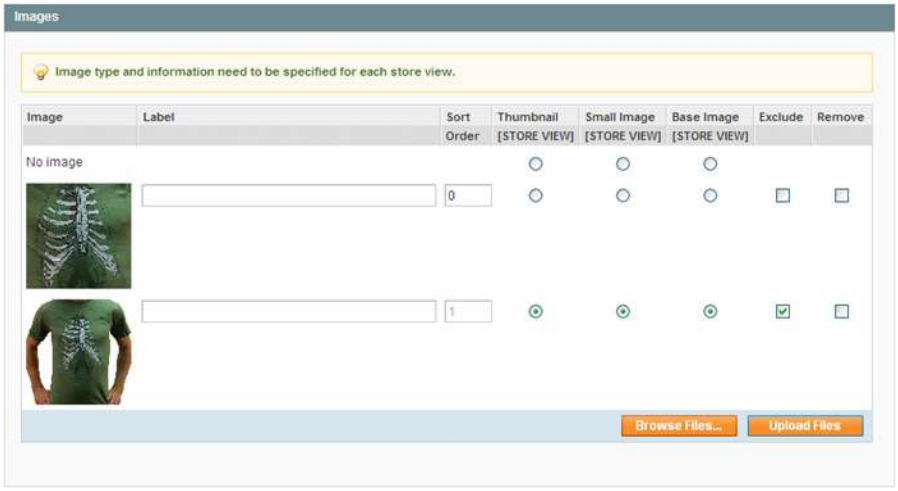
1 Select the **Images** option in the panel on the left to display the following page:



2 Specify the image to be displayed in the web store to represent this product. Use the **Browse** button to select the image file.

Tip: *You can select more than one file in this window to upload multiple images at once.*

3 After you have specified the image files of this product, click the **Upload Files** button. The following page is displayed after you have uploaded the image files:



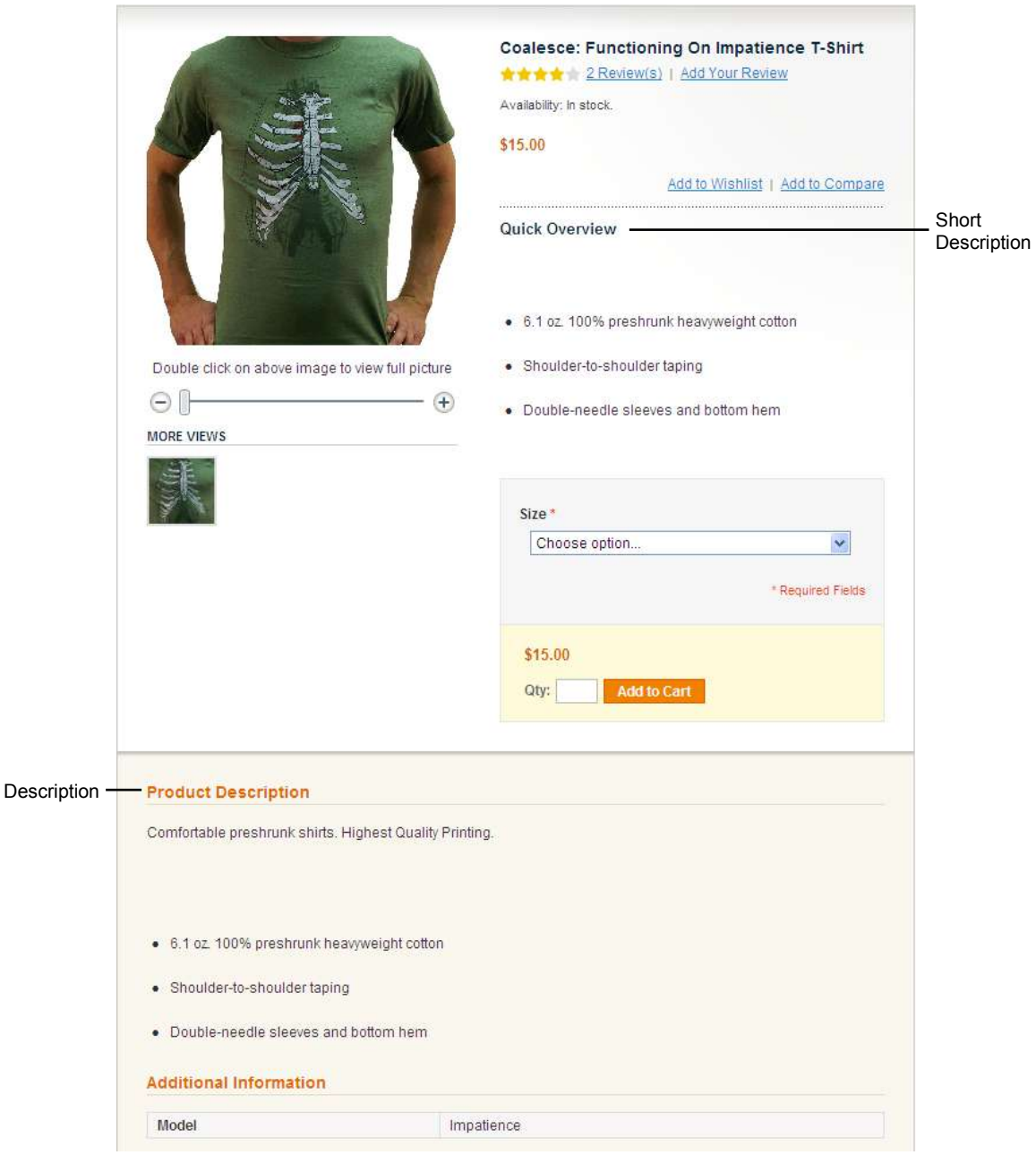
4 Select the appropriate options for each of the images, as follows:

- **Label:** Alternate text for the image tag.
- **Sort Order:** The order in which the images are displayed in the Slideshow and MORE VIEWS option
- **Thumbnail**: Used in shopping cart and related items.
- **Small Image**: Used in the Category listing, wish list and so on.
- **Base Image:** Large product image (zoomed in).
- **Exclude**: Excludes the image from the Slideshow and MORE VIEWS gallery.
- **Remove:** Deletes the image from the collection.

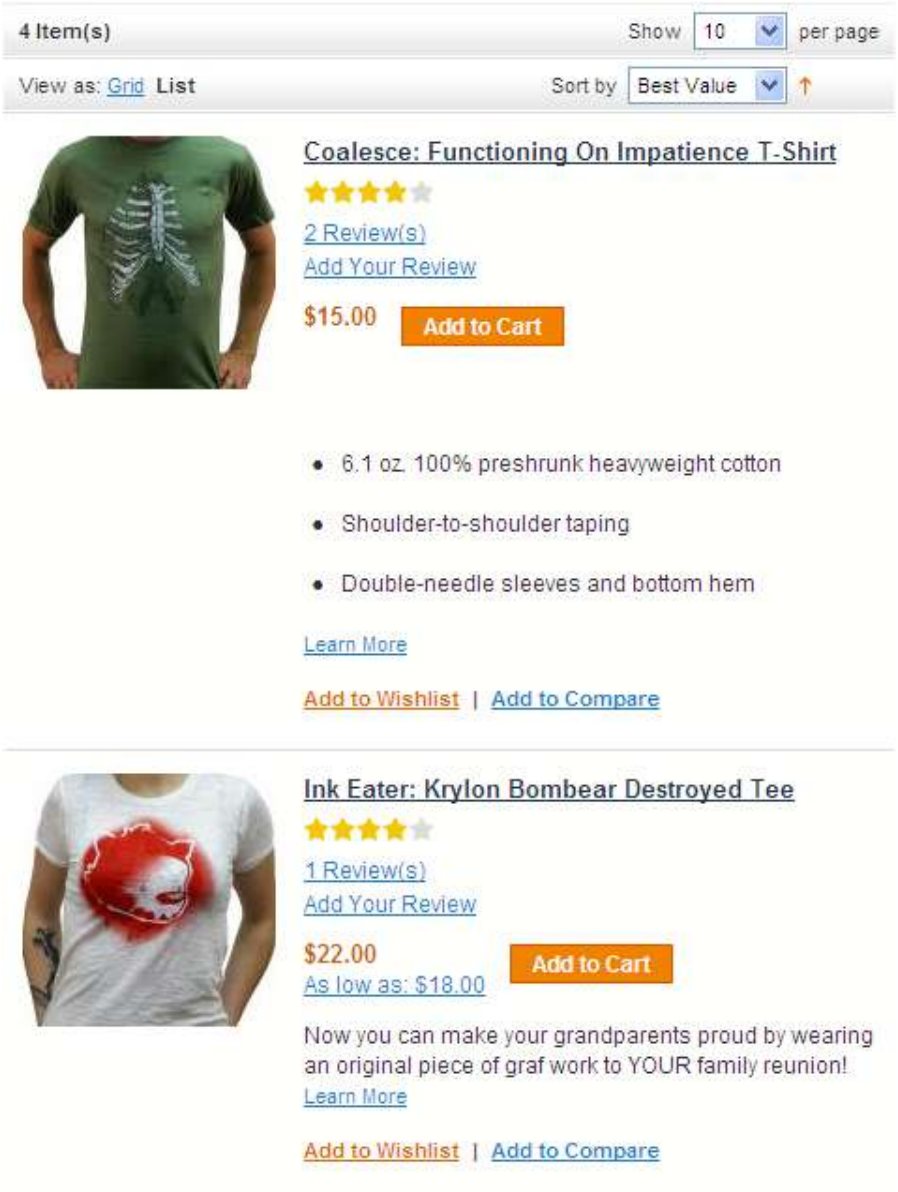
Description Product Wizard Page

1 Select the **Description** option in the panel on the left to display the following page:

2 Specify what is displayed in the Product's Information page. The information that you enter in the **Description** field is shown in the product's page under the title **Product Description**. The information that you enter in the **Short Description** field appears on the product's page under the title **Quick Overview**, as shown below:

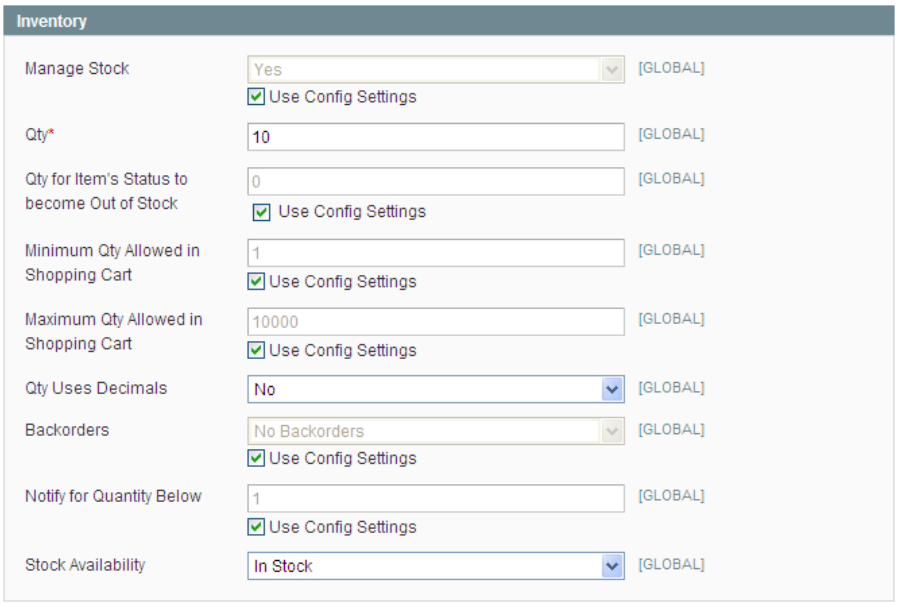


The information that you enter in the **Short Description** field is also shown when products are displayed in a list, as follows:



Inventory Product Configuration Page

1 Select the **Inventory** option in the panel on the left to display the following page:



2 In the **Manage Stock** field, select **Yes** to specify that all inventory options are available for this single product, or select **No** to specify that you do not want to manage product inventory (in this case, the product is permanently available in the store to your customers).

3 In the **Qty** field, specify how many items of this product you have in stock.

4 In the **Stock Availability** field, select the **In Stock** option.

5 In the **Qty Uses Decimals** field**,** select **Yes** to specify that customers can enter decimal quantities for this product, as opposed to integers. This is suitable for a product sold by the weight, volume or length. For example: 2.35 pounds of concrete or 3.75 feet of carpeting.

6 The **Backorders** field enables your customers to place an Order for a product that has a Qty of less than **0**. This option also enables you to notify your customers that even though there are no items of a product currently available, they can still place an Order. You can do this by selecting the **Allow Qty Below 0** option and the **Notify Customer** option. You can also enable this option without notifying customers by only selecting the **Allow Qty below 0** option.

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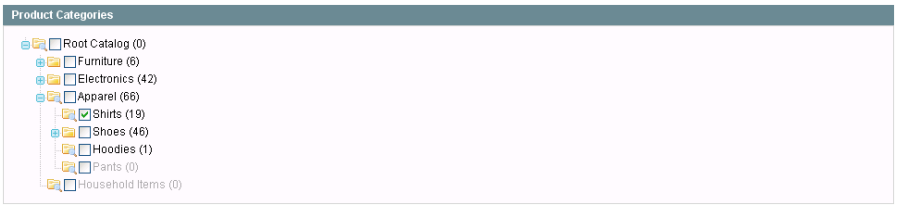
7 The **Minimum / Maximum Qty Allowed in Shopping Cart** fields enable you to limit availability to products that have great prices to retailers, so that they are not sold to wholesale customers.

8 In the **Qty for Item's Status to become Out of Stock** field specifies that if stock quantity falls below this level, then the product becomes **Out of Stock**.

> ***Note:*** *You can define both default product inventory settings and global inventory managements settings in the* ***System ➔ Configuration ➔ CATALOG ➔ Inventory****.*

Categories Product Configuration Page

1 Select the **Categories** option in the panel on the left to display the following page:



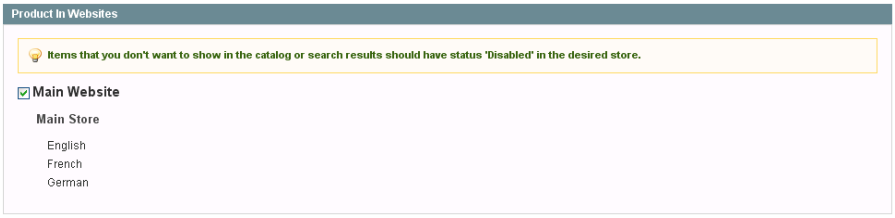
2 Specify the Categories to which this product belongs by checking the appropriate checkboxes.

> ***Note:*** *You can assign a product to more than one Category.*

> ***Note:*** *You can also assign a product to Categories while editing a Category.*

Websites Configuration Page

1 Select the **Websites** option in the panel on the left to display the following page:

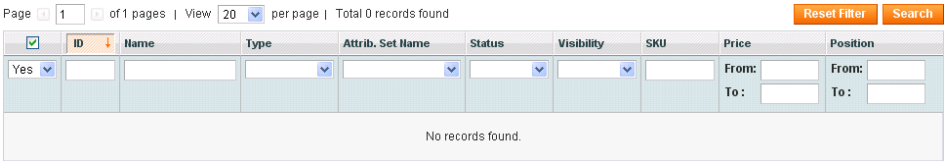


2 If your store has more than one website, store or store view, you must assign the product to the appropriate website in order to make it available in this website.

> ***Note:*** *Sample Data contains three store views. If you want to create a product in the Sample Data environment, you must check the* ***Main Website*** *option when creating a product.*

Related Products, Cross-sell and Up-sell Configuration Pages

Each of these pages is similar and enables you to configure relationships between products. The following appears in each of these pages:



1 To display all the products in the list, click the **Reset Filter** button.

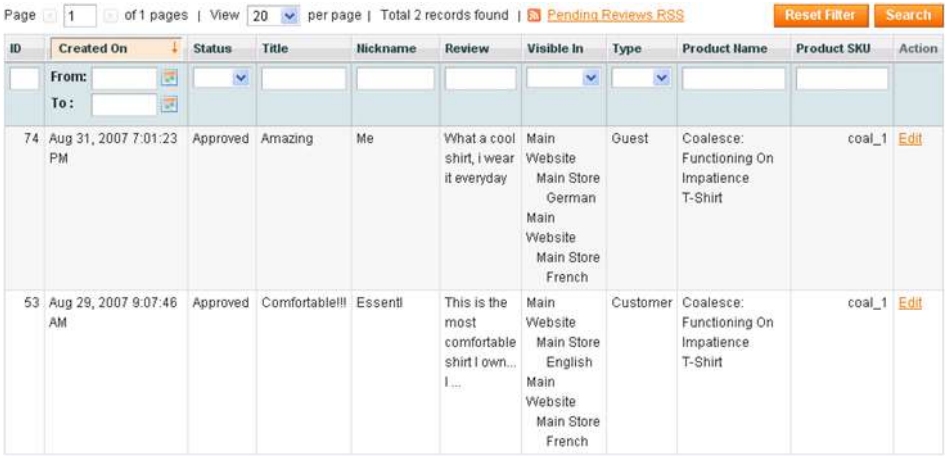
2 Select the relevant checkboxes to assign products. You can use any of the filters available to make it easier to search for the products that you want.

For more information about these pages, you may refer to in *Chapter 8, Promotions* on page 149.

Product Reviews Configuration Page

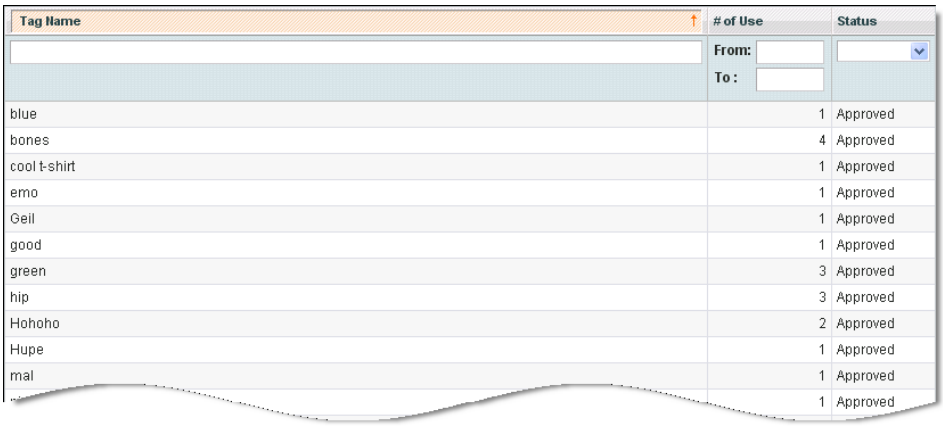
This page provides a list of reviews posted by customers about a product that is being edited or created. You can use the **Edit** button that appears in each review row to approve, edit or remove the review.

***Note:** The **Pending Reviews RSS** link enables you to receive notifications of all pending reviews and enables you to first approve them before they are shown on the site.*



Product Tags Configuration Page

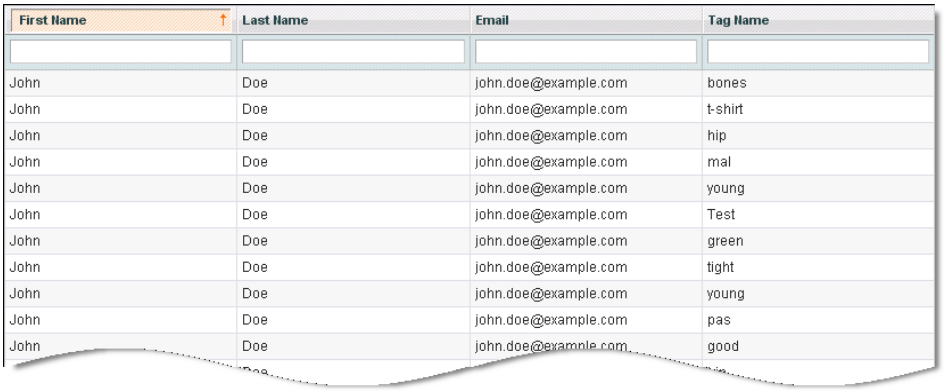
This page displays the tags assigned to a specific product by customers and how many times each tag was used.



***Note:** You can click on a tag row to edit it or Approve, Reject, Disable or Delete it.*

Customers Tagged Product Page

This page enables you to see which customers have tagged specific products.

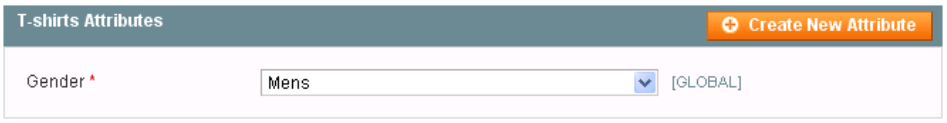


First Name	Last Name	Email	Tag Name
John	Doe	john.doe@example.com	bones
John	Doe	john.doe@example.com	t-shirt
John	Doe	john.doe@example.com	hip
John	Doe	john.doe@example.com	mal
John	Doe	john.doe@example.com	young
John	Doe	john.doe@example.com	Test
John	Doe	john.doe@example.com	green
John	Doe	john.doe@example.com	tight
John	Doe	john.doe@example.com	young
John	Doe	john.doe@example.com	pas
John	Doe	john.doe@example.com	good

Note: *You can click on a tag row to edit it or Approve, Reject, Disable or Delete it.*

Custom Group Configuration Pages

Additional configuration pages may appear depending upon the groups that you have created using the Attribute Sets tool. You may refer to the *Creating Attribute Sets* section on page 86 for more information about Attribute Sets. An example custom group T-Shirts Attribute is shown below:



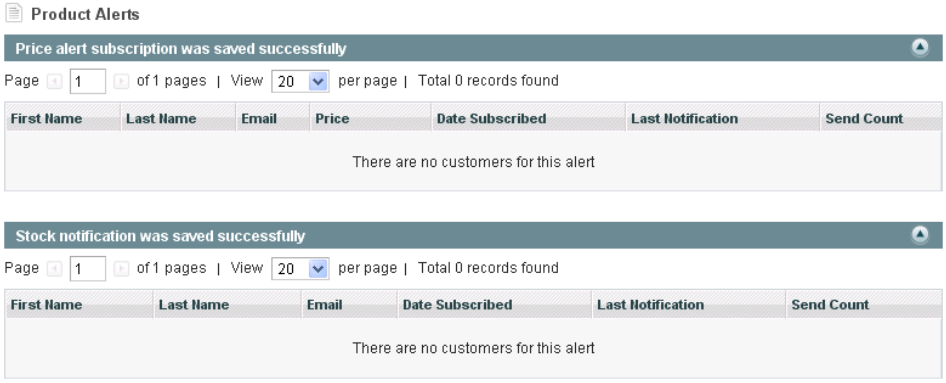
Fill in the attributes that appear in this page according to the definitions specified in the Attribute Set. Some of these attributes may be mandatory and each may be one of a variety of types according to the definitions of the Attribute Set.

Custom Options Configuration Page

This page enables you to easily create product variants or products that can accept customer input, such as custom imprints or gifts. You may refer to the next section for more information on this topic.

Product Alerts Configuration Page

This page is only available when alerts are enabled from the **System** menu ➔ **Configuration** ➔ **CATALOG** ➔ **Catalog** option.

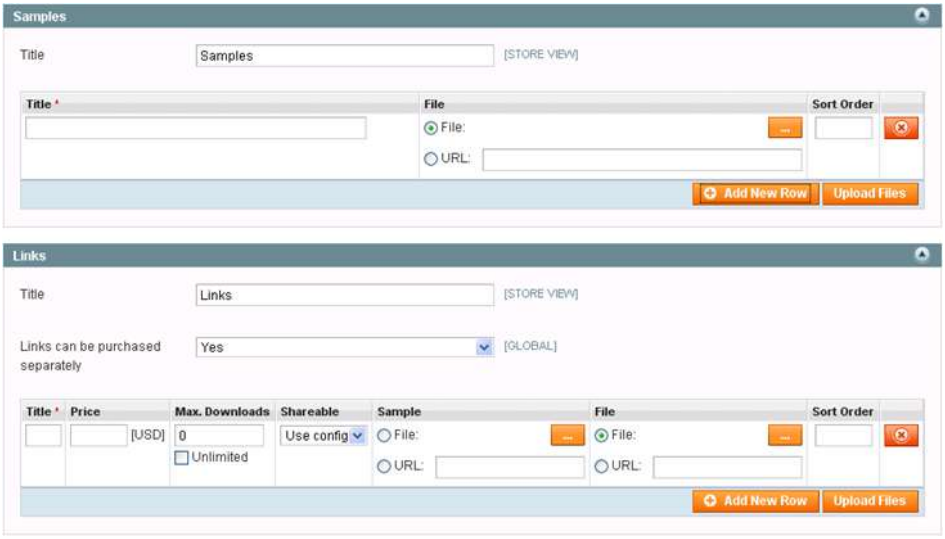


This page displays a list of the customers that have subscribed to each of the alerts and the date on which they were notified about changes.

Product Type Dependent Configuration Pages

Depending upon the product type, additional configuration pages may appear. The following provides a quick review of these types of pages.

Downloadable Products – Downloadable Information Page

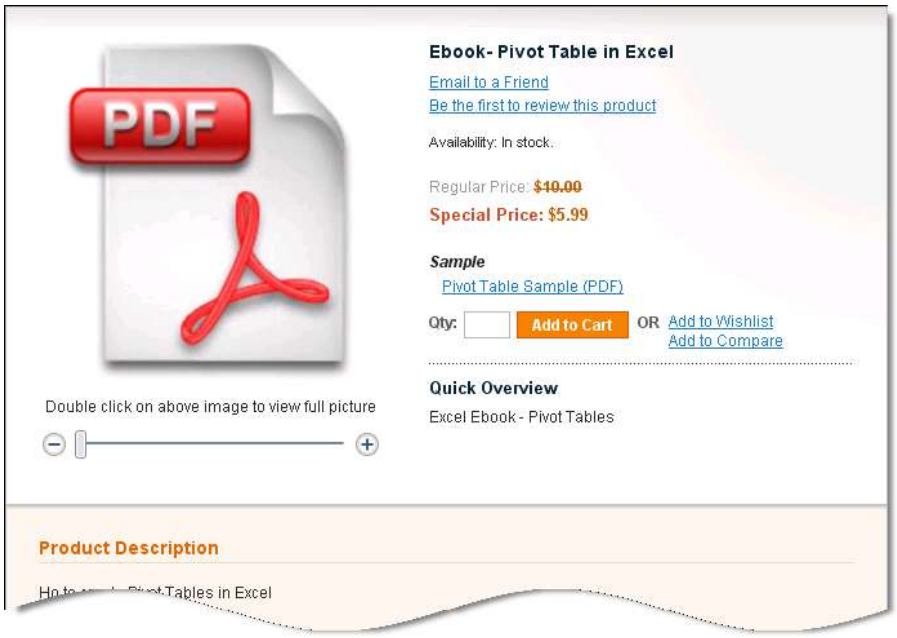


This page contains two sections:

- The **Samples** section enables you to display a sample of the downloadable product on the product's information page. For example, this can be a short sample of a music file, a few pages of an eBook or a trial version of a software application. You can put as many samples as you require by clicking the **Add New Row** button and filling out the fields. You can add files using two methods:
  - Selecting the **File** option, clicking the **...** button and then clicking the **Upload Files** button. This will upload the file from your local computer to the server.

    Or
  - Selecting the **URL** option and specifying the link to a file that is already on a server in a different location and clicking the **Upload Files** button.

Samples put in the Samples section appear in the store as follows:



- The **Links** section contains the actual products that can be purchased, along with possible samples for them.

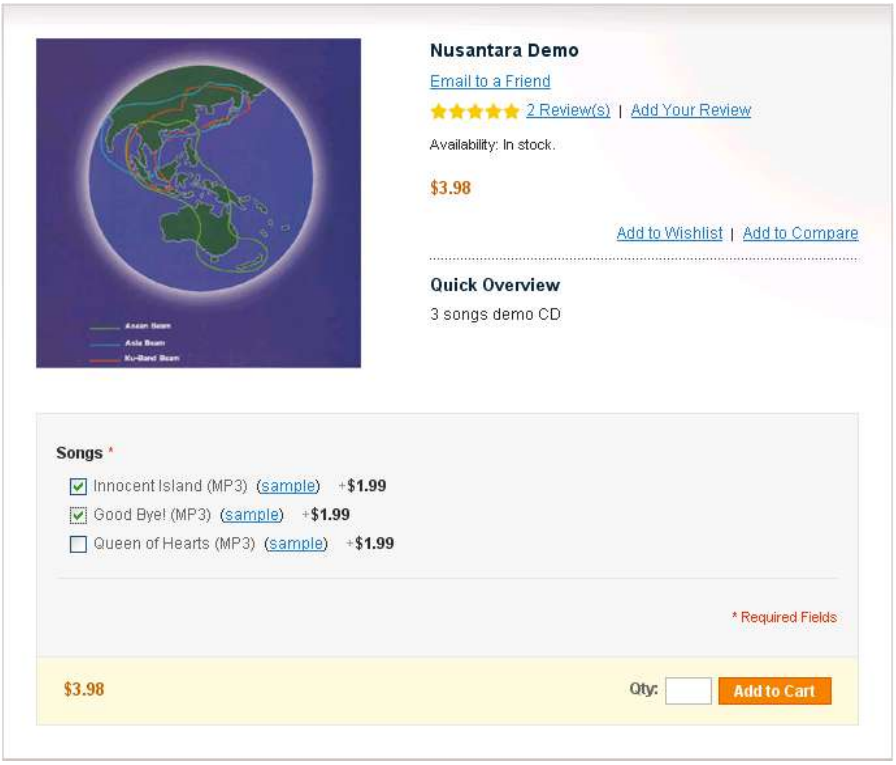
  The **Links can be purchased separately** option controls whether each of the downloadable products can be purchased by itself or not.

  This enables, for example, the tracks of a music CD product to be purchased separately. If you set this option to **Yes**, then you must input the price for each of the downloadable items.

  Each of the items also has two options controlling its behavior. The **Max. Downloads** option controls how many times after purchase a product can be downloaded by the customer. The **Shareable** option controls whether after each purchase of the product, the downloadable item is available for download without logging in or if it requires logging in. If the **Shareable** option is set to **Yes**, then customers can click links in the Order confirmation email that they receive in order to get the product. However, this also enables anyone who gets this link to download the product. Setting this option to **Yes** is the only way to enable Guests to checkout (or to enable a comparable quick checkout method, such as PayPal Express or Google Checkout) to download the product. There are configuration settings that must be checked to match your store.

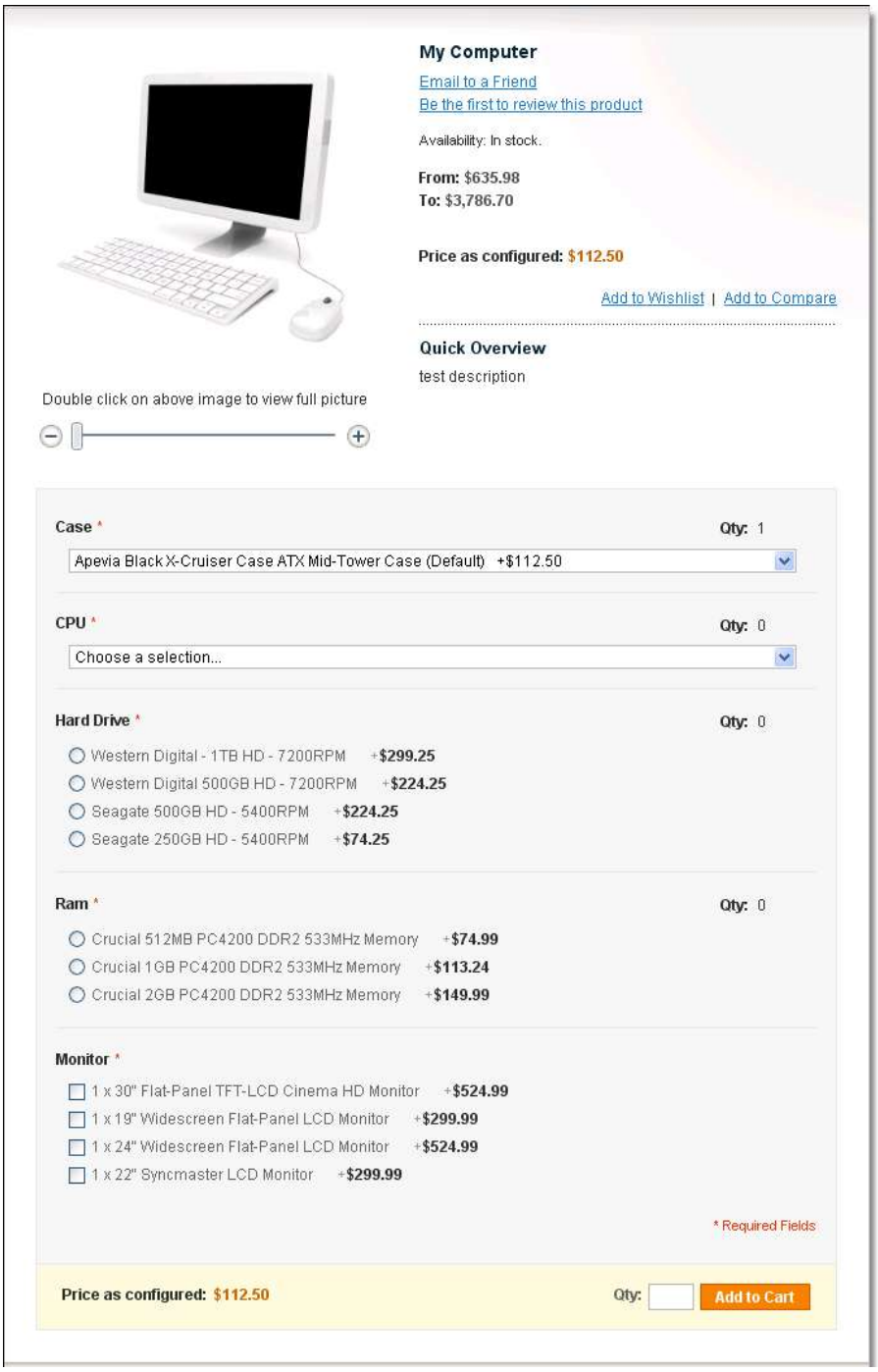
The uploading process is similar to the uploading of the samples, as described above, with the exception of providing an option to tie in samples files for each download product. This feature can be used to provide customers with a short sample of each track of a music CD, for example.

The following shows a product in a store with three links and samples for each of them, for which the setting **Links can be purchased separately** was set to **Yes**.



Bundle Product – Bundle Items Configuration Page

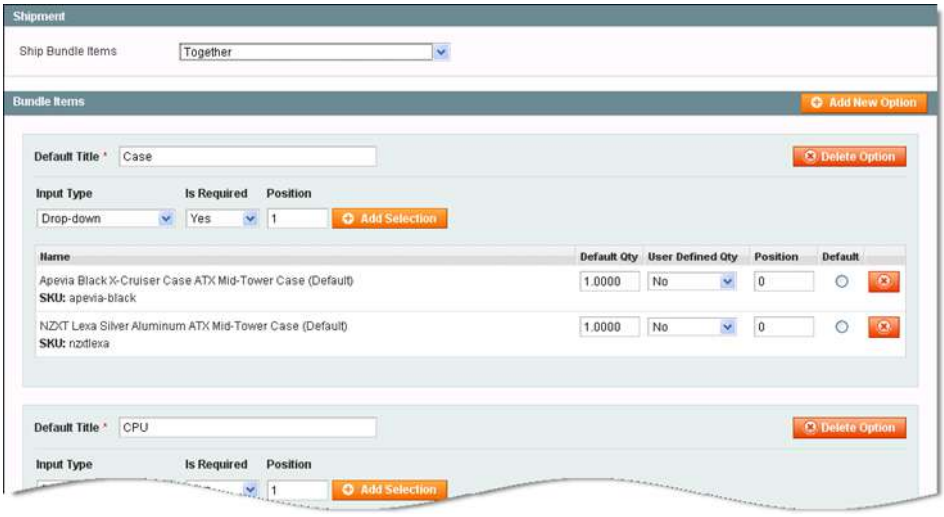
An example of a bundled product is this Build Your Own Computer offerings found in the demo store:



In Bundled product types, there are also differences in the **General** and **Prices** pages, as follows:

- **SKU Fixed or Dynamic:** Specifies whether the entire product is assigned an SKU based on its components, or is the SKU fixed for the bundle.
- **Weight Fixed or Dynamic:** Specifies whether the entire product's weight is based on the weight of its individual components, or is the weight fixed for the entire bundle.
- **Price View:** Specifies whether the product's price is shown as a range, from the least expensive component to the most expensive (Price Range), or is only the least expensive shown (As Low As).
- **Ship Bundle Items**: Specifies whether individual components are shipped separately or whether the entire product is shipped.
- **Bundle Items:** Bundled Items appear in the store as a list of available options. You can add a new option using the **Add New Option** button. For each option you can configure its title, input type (single and multiple selection fields are available), whether the field is mandatory (for example: it can be **True** for a computer processor and **False** for an additional battery of a laptop computer) and its position on the page.

You can see an example of this in the Backend by viewing the **My Computer ➔ Sample Product ➔ Bundle Items** page.



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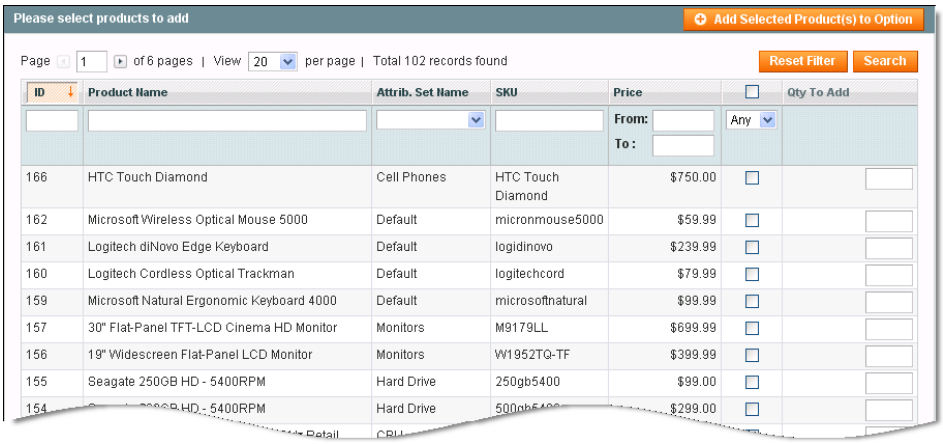
You can then specify individual values for each option. Click the **Add Selection** button to open a selection area, as shown below:



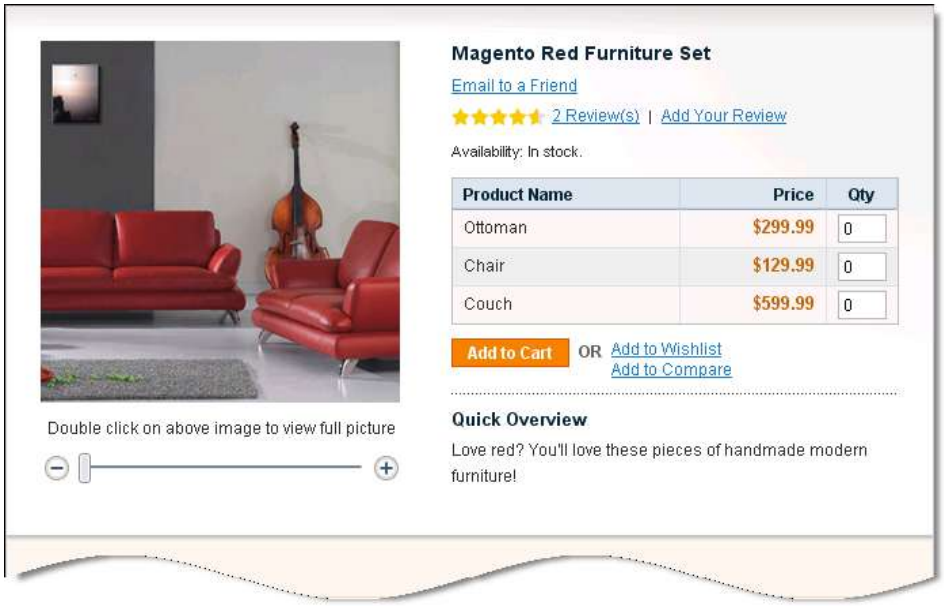
You can select any product that you want using the checkboxes. Click the **Add Selected Product(s) to Option** button to confirm the assignment. For each selection, you can then define the following options:

- **Default Qty:** Specifies the default quantity shown in the product view page.
- **User Defined Qty:** When set to **Yes**, this option enables customers to enter a quantity for a given selection.
- **Position:** Specifies the Orders of a selection.
- **Default:** Specifies the predefined value.

Grouped Product – Associated Products Configuration Page

A grouped product enables you to purchase each of the items separately.

In the store, a grouped product appears as follows:



When creating a Grouped Product, the Associated Products page enables you to specify which products are included in a group, as well as the default quantity for each and their position (order) on the page.

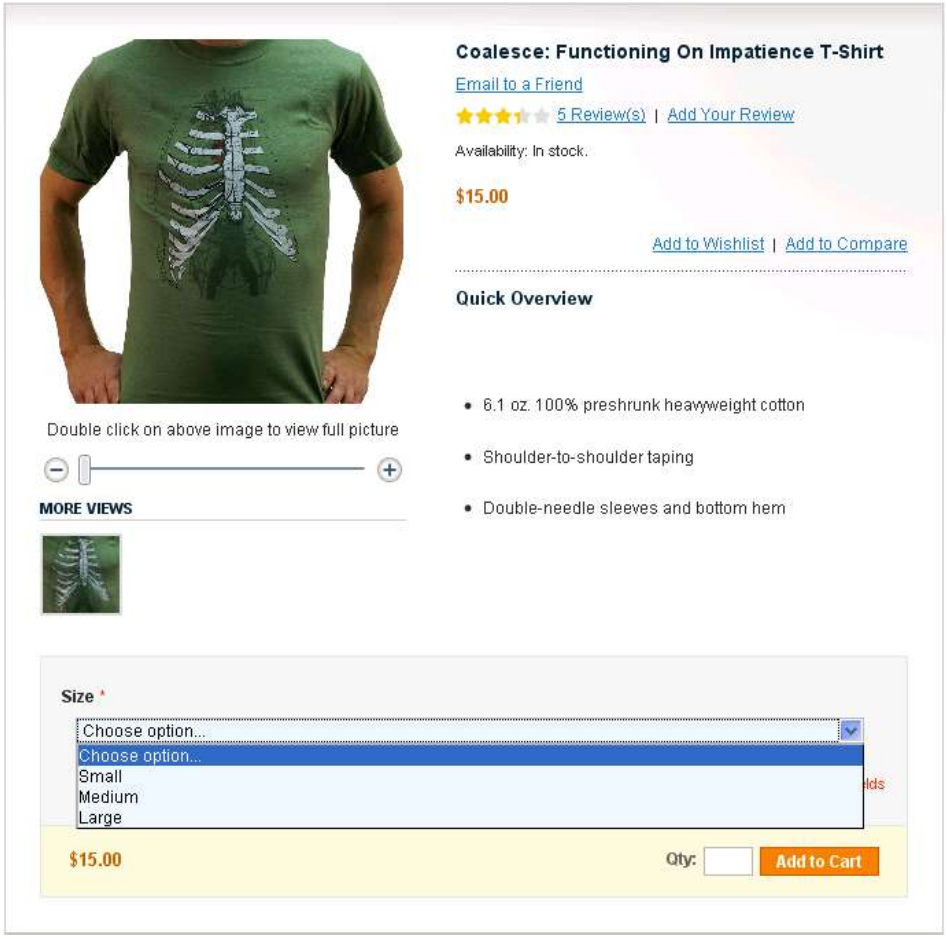
	ID	Name	SKU	Price	Default Qty	Position
Yes				From: To:	From: To:	From: To:
☑	53	Couch	1113	$599.99		
☑	52	Chair	1112	$129.99		
☑	51	Ottoman	1111	$299.99		

Note: *There is no global price for grouped products. Their price is only controlled by the individual elements that you purchase.*

Configurable Product – Associated Products Configuration Page

Configurable products must be associated with simple products using Attributes that a Customer can select from a configurable product page. This means that when a shirt is offered in three sizes, then three simple products must be assigned to the configurable product, one for each size.

The configurable product appears in the store with a section that provides customers with options like the following shown below for **Size**:



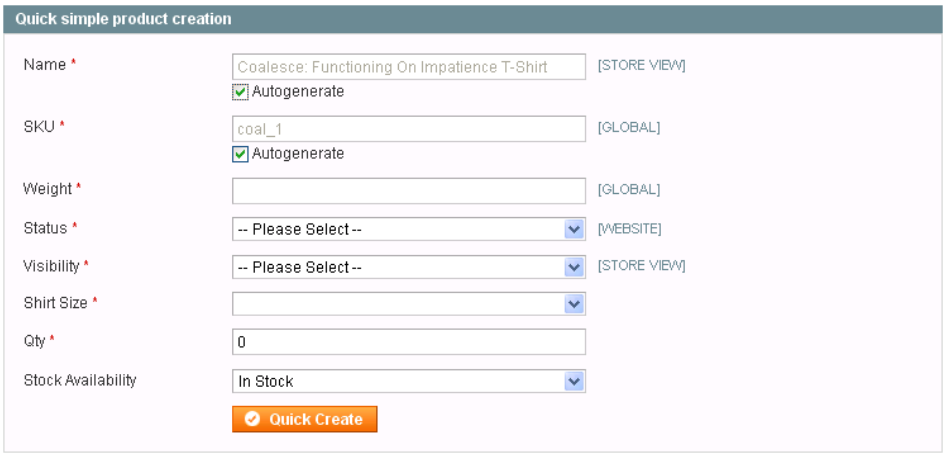
This is the most complex configuration page and it is described below it in three stages.

Create Simple Associated Product

This section enables you to create simple products along with the configurable product.

Click the **Create Empty** button to open a popup window with a regular product creation page, but that has a preselected product type, **Simple Product**, and an Attribute Set that is the same as the configurable product.

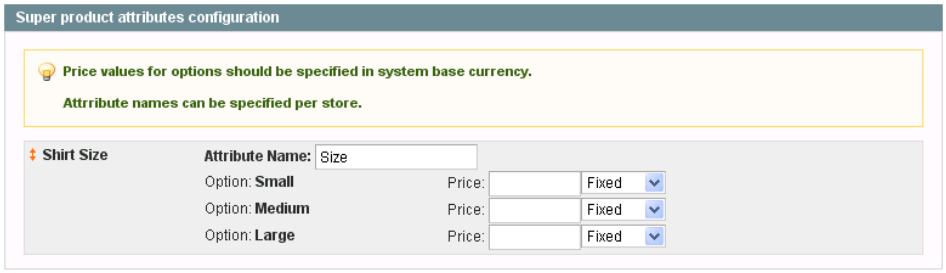
The **Copy from Configurable** button works in a very similar manner to the above, but it pre-fills many of the fields with information from the configurable product, as shown below.



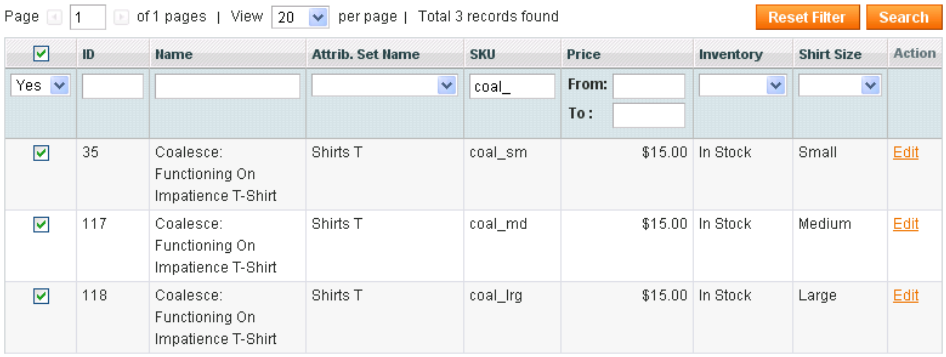
This area enables you to quickly create simple products without filling in all the information. Fill in the required fields and click the **Quick Create** button to create this product. The **Auto generate** option enables Magento to select the **Name** and **SKU** based on the Attributes.

Super Product Attributes Configuration

This section enables you to specify the Attribute Name that appears in the store for selection and the price for each of the options. Two price options are provided: **Fixed** or **Percentage**.



The price for configurable products is a combination of the price from the Price Configuration page, as described in the *Prices Product Configuration Page* section on page 94 and the values entered in this area. This means that if the configurable product's price is $20 and the price for the Medium option is: Percentage and 10, then this variation of the product costs $22. The price of the associated products is not used for calculation.

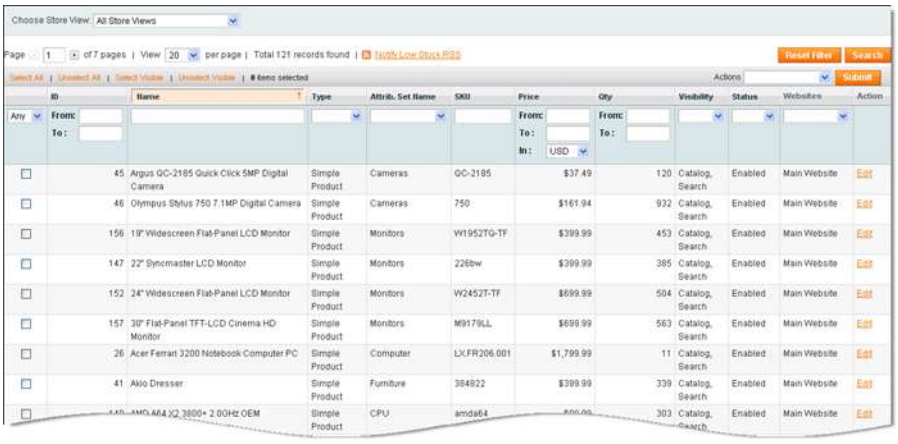


Completing the Product Wizard

Click the **Save** or **Save and Continue Editing** button in the top right corner of the page. If you choose the latter, after saving the product you are redirected back to its page.

To edit an existing product:

1 From the **Catalog** menu, select the **Manage Products** option to display a list of products, as shown below:



2 Click the **Edit** link on the right side of the row of the relevant product.

Mass-Changing Products

Magento provides various features that enable changes to be made on multiple products or their properties. On the product list, mark products using the selection checkboxes. Then select one of the actions from the **Actions** dropdown field and click the **Submit** button:

- **Delete:** Deletes the selected products from the store.
- **Change Status:** Disables or enables multiple products at once.
- **Update Attributes:** Updates the attributes of multiple products. When you click the **Submit** button, a new page opens containing a list of all attributes for all selected products. You can change any of the attributes and then select the **Change** field to notify Magento as to which of the attributes have been updated. Click **Save** to confirm the changes.

Creating Variations of a Product

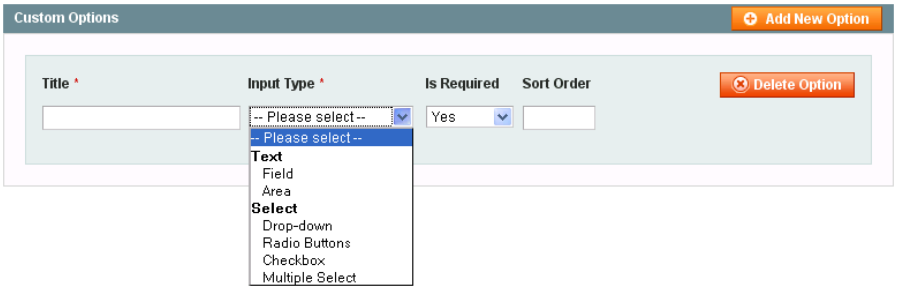
This section describes how to create variations of a product by adding input controls (input options) to a product's page. An example of the variation of a product is the same product with different colors or sizes. In this case a customized field must be added by you to enable the customer to select the required color or size.

***Tip:** If you want to track the quantity that is sold of each variant of the product, you must create a separate product for each variant of the product and group them in the product of type Configurable, and not use the variations options described here.*

To create variations of a product:

1. From the **Catalog** menu, select the **Manage Products** option to display a list of products.
2. Click the **Add Product** button to create a new product or click the **Edit** link to the right of the relevant product to open the edit page.
3. Select **Custom Options** on the bottom left of this page to display the following:

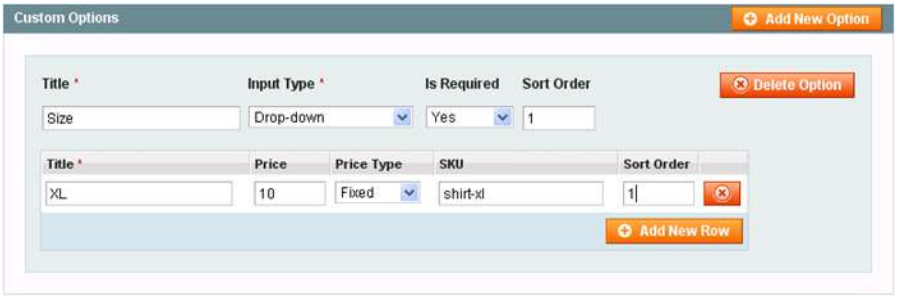
4. Click the **Add New Options** button on the top right of this page to display the following:



5. In the **Title** field, specify a name for this new property, such as the name **Size**.
6. In the **Input Type** field, select the type of input that can be given in this field, such as text or dropdown menu, as shown above.
7. In the **Is Required** field, select **Yes** to indicate that this is a mandatory field, meaning that a customer must select an option in this field in order to purchase this specific product.

8 If there is more than one option, then specify the order in which this option appears in the **Sort Order** field. **1** indicates that it appears first.

9 Click the **Add New Row** button to display the following row in which you can define the new variation of this product. For example, the product in a certain size and its corresponding price.



10 In the **Title** field, specify the name of this variation of the product, such as **Size XL**.

11 All the prices in these rows are relative to the price of this product as defined in the **Prices** page of the product wizard described on page 94. In the **Price Type** field, select one of the following options:

- **Fixed:** To specify that the price of this variation of the product differs from the price of the base product by a fixed monetary amount, such as **$1**.
- **Percentage:** To specify that the price of this variation of the product differs from the price of the base product by a percentage, such as **10%**.

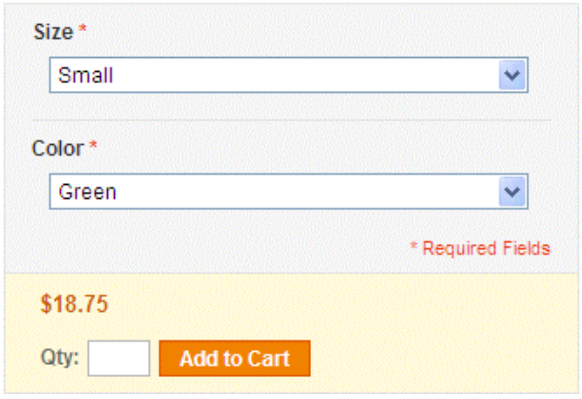
12 In the **Price** field, specify the difference between the price of this variation of the product and the price of the base product. Specify a fixed amount or a percentage according to the value that you entered in the **Price Type** field. You can also enter negative values.

13 In the **SKU** field, specify the SKU for this variation of the product.

14 If there is more than one variation, then specify the order in which this option appears in the **Sort Order** field. **1** indicates that it appears first.

15 Click the **Save** button. This example product is shown in the web store, as shown below:

In this example, you can see that the price is **$13.50**. However, if the **Green color** is selected, then the price is **$18.75**, as shown below:



Note: *If this product is added to the customer's shopping cart, then the variation information appears there, as shown below:*

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6 Preparing to Sell

This chapter describes how to prepare your web store to start selling products by defining tax charges and defining how products are shipped and money is accepted. This chapter contains the following sections:

- **Taxes,** page 121
- **Shipping,** page 127
- **Payment,** page 132

Taxes

Magento provides a variety of options for defining taxes that can be accessed by selecting the **Sales** menu and then the **Tax** option. Tax classes are used to define Tax Rules. Tax Rules are defined as a combination of a Product Class, a Customer Class and a Tax Zone and Rate, as described below.

Each type of customer can be assigned a class when you define them and each product is assigned a tax class. For a description of how to define a customer, you may refer to the *Adding a Customer* section on page 176. For a description of how to define a product, you may refer to the *Creating a New Product* section on page 91.

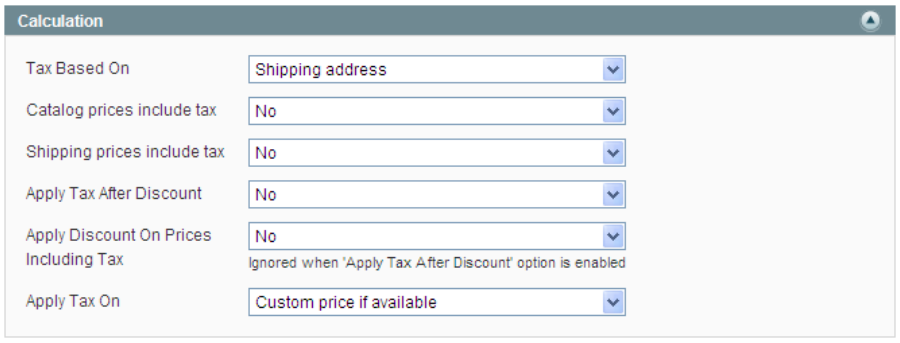
Magento analyzes the shopping cart of each customer and calculates the appropriate tax according to the class of the customer, the class of the products in the shopping cart and the region (as defined by the customer's shipping address, billing address or shipping origin).

General Taxation Settings

To configure general taxation settings:

1. From the **System** menu, select the **Configuration** option.
2. From the **SALES** section in the panel on the left, select **Tax**.
3. Expand the **Tax Classes** section, and in the **Tax Class for Shipping** field, specify the tax class charged on the shipping amount, as shown below. With Sample Data populated, we have added three examples of Tax Classes for Shipping. If your store changes additional tax on shipping expenses then you should designate the Product Tax Class that will apply to Shipping. More information on configuring these rules can be found ahead.

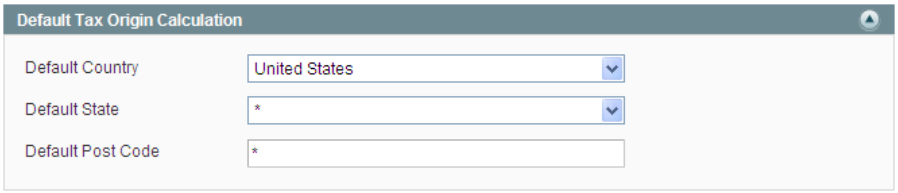
4. Expand the **Calculation** section, as shown below:



5. In the **Tax Based On** field, specify the shipping address, billing address or shipping origin.
6. In the **Catalog prices include tax** field, specify if the prices entered for products are net (No) or gross (Yes).
7. In the **Shipping prices include tax** field, specify if the prices entered for shipping are net (No) or gross (Yes).

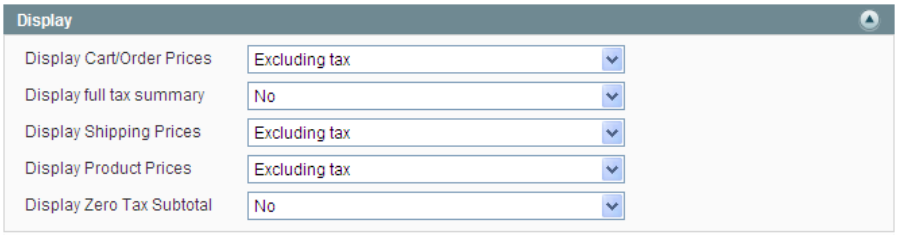
8 In the **Apply Tax After Discount** field, specify whether tax is applied to the original or discounted price.

9 Expand the **Default Tax Origin Calculation** section to specify which country is used by Magento as the default for tax calculation, as shown below:



Note: *If you set the* ***Display Product Prices*** *field to* ***Including Tax*** *in the* ***Display*** *section described below, then the tax is only displayed if there is a Tax Rule matching the tax origin or if Magento detects that the customer address matches the Tax Rule (which happens after a customer creates an account, logs in or uses the Tax and Shipping estimation tool in the cart).*

10 Expand the **Display** section to specify how taxes and prices are shown for products and in a cart according to the requirements (legal and otherwise) of your store, as shown below:



In the Fixed Product Taxes specify the behavior of fixed per product taxes, such as the European DEEE/WEEE (**Waste Electrical and Electronic Equipment)** tax, according to the requirements for your store and products.

Note: *To assign a fixed tax to a product, create an Attribute with the* ***Catalog Input Type for Store Owner*** *set to* ***Fixed Product Tax****, and assign this Attribute to a product.*

Product Tax Class

To define a product tax class:

1. From the **Sales** menu, select the **Tax** option and then the **Product Tax Class** option to display the following page, which shows a list of the previously defined product tax classes.

2. Click the **Add New** button to display the following page:

3. In the **Class Name** field, enter a name for this tax class.

> ***Note:*** *You can apply a tax class to a product by editing the product and choosing the appropriate option on the* ***Prices*** *tab.*

4. Click the **Save Class** button.

Customer Tax Class

To define a customer tax class:

1. From the **Sales** menu, select the **Tax** option and then the **Customer Tax Classes** option to display a list of the previously defined customer tax classes.
2. Click the **Add New** button to display the following page:

3. In the **Class Name** field, enter a name for this tax class.

> ***Note:*** *You can link a Customer's tax class to a Customer group by editing a Customer group. You can then assign this Customer group when creating or editing a Customer.*

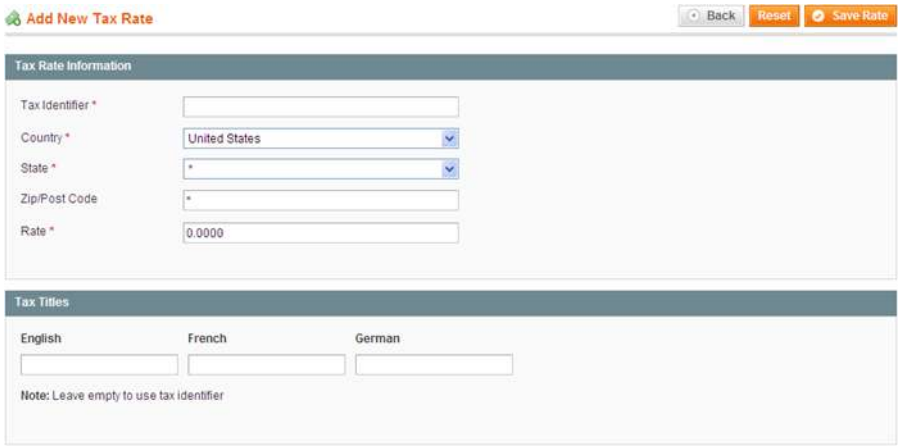
4. Click the **Save Class** button.

Tax Zones and Rates

To define tax zones and rates:

1. From the **Sales** menu, select the **Tax** option and then the **Manage Tax Zones and Rates** option to display a list of the previously defined tax zones and rates.

2. Click the **Add New Tax Rate** button to display the following page:



3. In the **Tax Identifier** field, enter a unique name for this tax. Do not use spaces. This identifier is not shown in the web store if the **Tax Titles** section is filled in, as described below.
4. Enter the **Country** and **State** fields.
5. In the **Rate** field, specify the percentage of tax.
6. In the **Tax Titles** section, enter the name of this tax.
7. Click the **Save Rate** button.

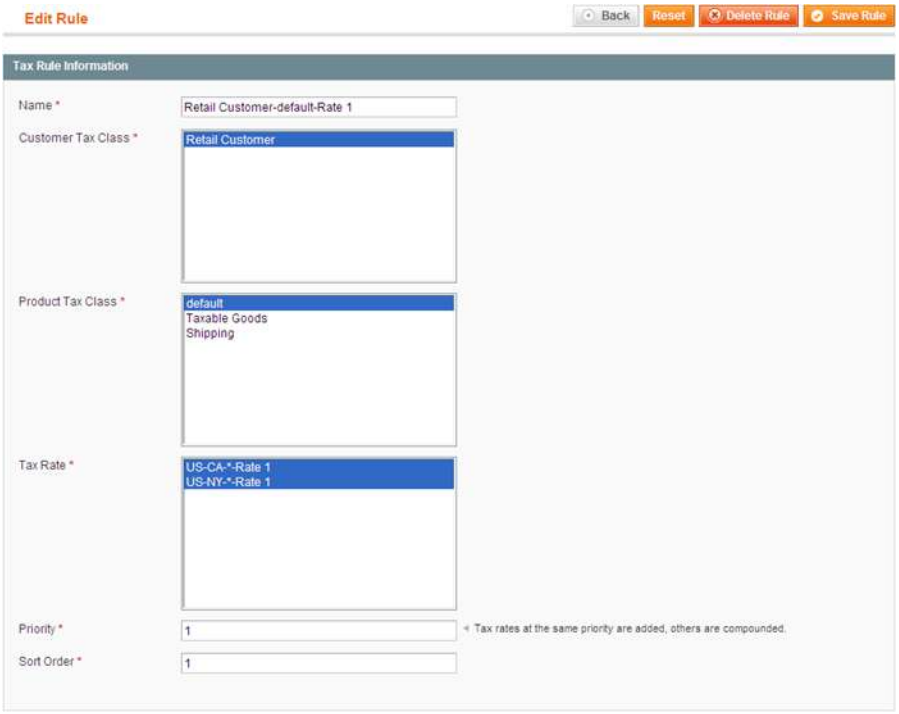
Tax Management Rules

To define Tax Management Rules:

1. To define how taxes are charged, from the **Sales** menu, select the **Tax** option and then the **Manage Tax Rules** option to display a list of the previously defined tax rules, as shown below:

   Each tax rule is comprised of a **Customer Tax Class**, **Product Tax Class** and **Tax Rate**.

2. To define a new tax rule, click the **Add New Tax Rule** button to display the following page:



3. Select a **Customer Tax Class, Product Tax Class** and **Tax Rate** in the relevant fields. This rule defines that the **Tax Rate** you select is applied to the Customers in the selected **Customer Tax Class** and the Products in the selected **Product Tax Class**.

4 In the **Tax Priority** field, specify the priority of this tax, when more than one tax applies. If two tax rules with the same priority apply then the taxes are added together. If two taxes with a different priority apply then the taxes are compounded.

Tip: *When numerous taxes must be defined, you can ease the process by importing them from a spreadsheet. From the* ***Sales*** *menu, select the* ***Tax*** *option and then the* ***Import/Export Tax Rates*** *option.*

Shipping

A variety of shipping rates are available for selection in Magento. This section describes a few of these shipping rate options for your web store.

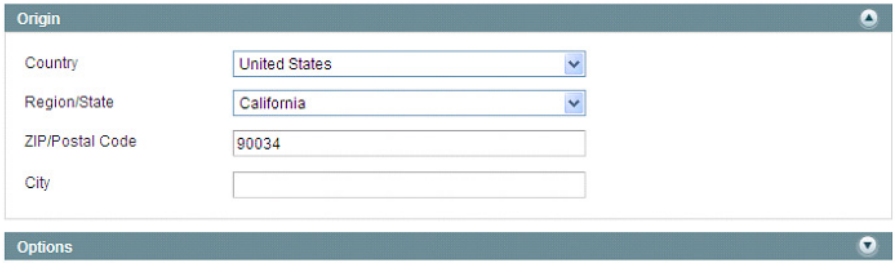
General Shipping Settings

To configure general shipping settings:

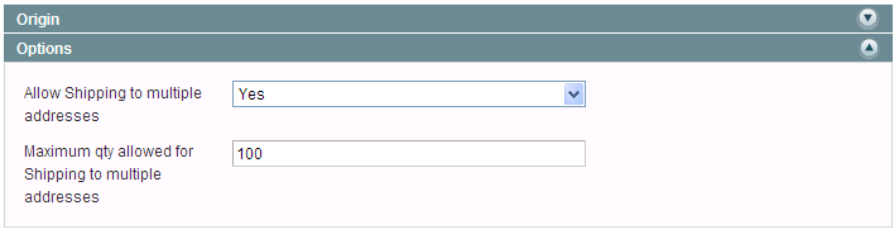
1 From the **System** menu, select the **Configuration** option.

2 From the **SALES** section in the panel on the left, select **Shipping Settings**.

3 Expand the **Origin** section and specify the address used for shipping calculations. Typically, this is the warehouse address from which products are shipped, as shown below:



4 Expand the **Options** section, as shown below:



5 In this section, enable or disable shipping to multiple addresses. Shipping to multiple addresses is very useful for stores that sell gifts. It enables customers to send various parts of an Order to different destinations.

Flat Shipping Rates

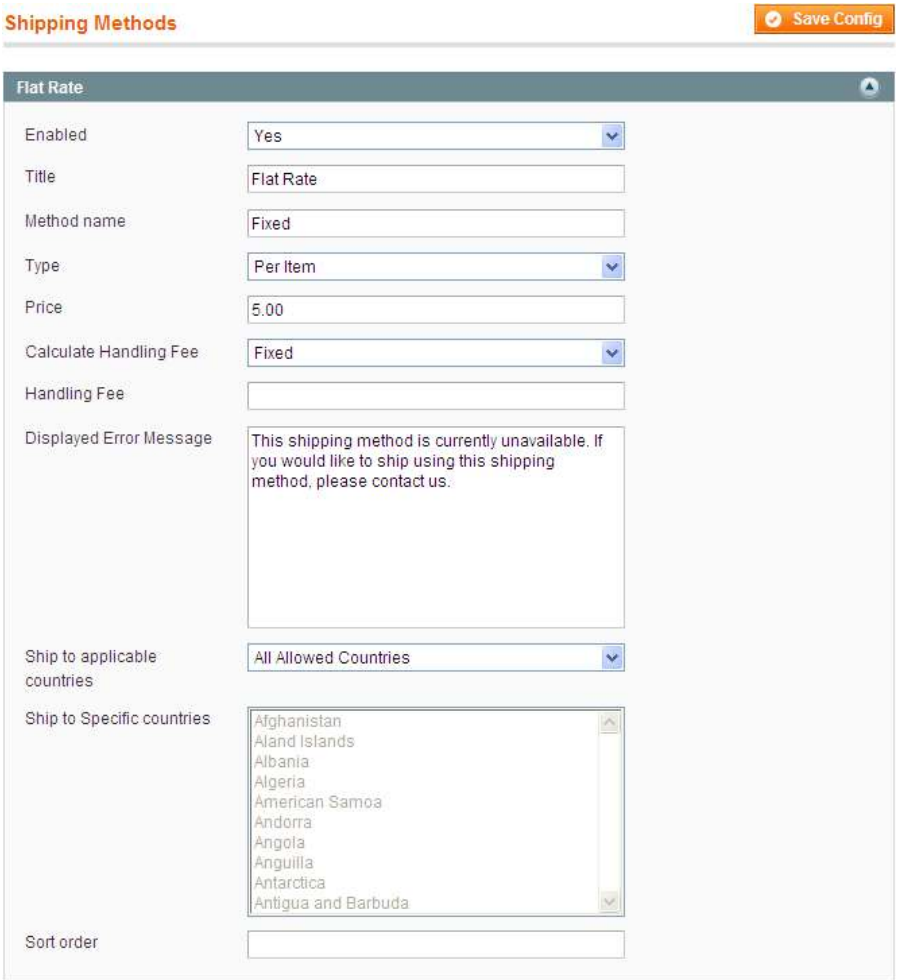
A flat shipping rate refers to a fixed predefined cost for shipping which can be applied per item or per Shipment according to your preferences.

To define flat shipping rates:

1 From the **System** menu, select the **Configuration** option.

2 From the **SALES** section in the panel on the left, select **Shipping Method**.

3 Expand the **Flat Rate** section to define a fixed predefined amount for shipping, as shown below:



Tip: *Magento also provides the option to specify table rates by expanding the* ***Table Rates*** *section. This enables you to define shipping rates by Weight, Destination, Price, the Number of Items and various combinations of these Categories. The table rates are entered by importing a CSV file. You may refer to http://www.magentocommerce.com/knowledge-base/entry/how-do-i-set-up-table-rate-shipping for more information.*

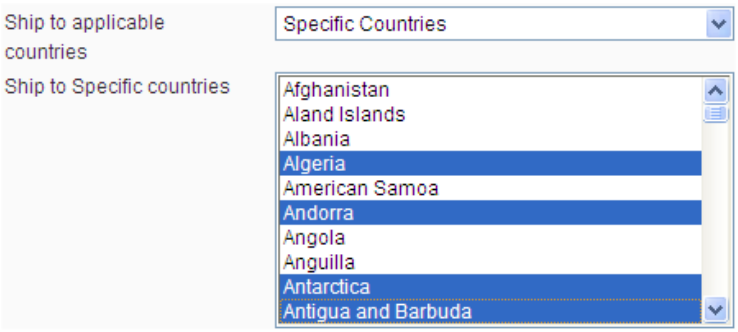
4 In the **Enabled** field, select **Yes**. The flat rate method then appears as an option in the shopping cart and on the shipping page during the checkout.

5 The contents of **Title** and **Method name** fields appear as follows in the web store:

Note: *Some Shipping Methods, such as UPS provide a variety of shipping methods to choose from.*

6 In the **Type** field, specify the entity to which the shipping fee applies, such as **Per Item**. In this case, the shipping fee is dependent on the number of items shipped. If you set the rate to be per item, it is multiplied by the total quantity of items in the shopping cart. If you have two of the same item or two different items, then the rate is the same. You can also select **Per Order** in this field.

7 In the **Ship to applicable countries** field, you can select the **Specific Countries** option to enable access to the field under it in which you can select specific countries, so that the appropriate (and different) shipping rates are applied to the relevant countries, as shown below:



> ***Tip:*** *Hold down Ctrl key while clicking options to select multiple countries.*

8 In the **Sort Order** field, specify the position of this shipping method in relation to the other shipping methods offered to the customer.

Online Rates

Apart from static options like flat or table rates, Magento also offers dynamic retrieval of rates from various products, such as UPS, USPS, FedEx, DHL and so on.

> ***Note:*** *Most shipping providers require that you open an account with them. Consult your shipping provider for details on how to obtain API credentials.*

The configuration of this method is very similar to the configuration of a Flat Rate, as described above. The exact options depend on the service provider.

For example, UPS rates can appear as follows in your web store:

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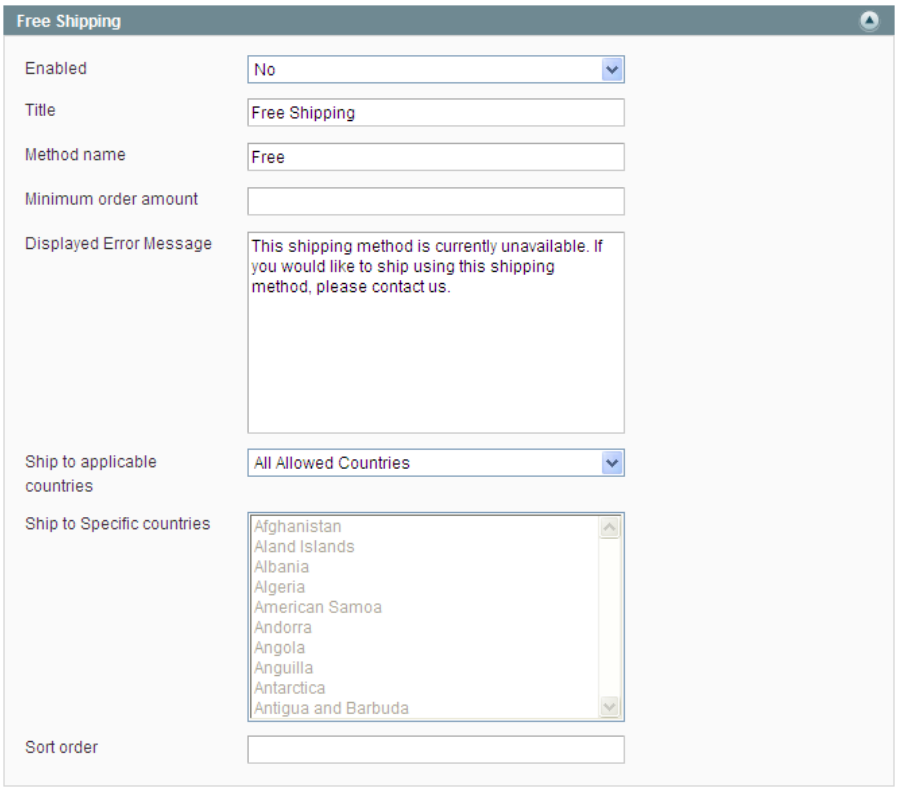
Offering Free Shipping

Tip: *Free shipping per product can be defined as a shopping cart price rule. You may refer to the Chapter 8, Promotions on page 149 for more information. This option enables you to set up free shipping that is only valid when a customer enters the appropriate discount code.*

To define free shipping:

1. From the **System** menu, select the **Configuration** option.
2. Select the **SALES** section in the panel on the left, select **Shipping Methods**.
3. Expand the **Free Shipping** section to enable free shipping with optional minimum order amount, as shown below:



4. In the **Enabled** field select **Yes** to enable the method.
5. In the **Minimum order amount** field specify the amount for an Order over which shipping is provided free of charge.

6 In the **Ship to applicable countries** field, you can select the **Specific Countries** option to enable access to the field under it in which you can select specific countries, so that free shipping is only applied to the relevant countries or you can select the **All Allowed Countries** to specify that free shipping is available for users from all countries.

Acquiring Additional Shipping Modules

Tip: *Numerous other shipping modules are provided at http://www.magentocommerce.com/magento-connect and new ones are uploaded often. More information on installing shipping extensions is provided in the* ***Extending Magento*** *section on page 207.*

Payment

Now that you have a method to calculate the cost of the shipping of your products, you can configure the payment options that enable the collection of money. Magento offers several payment options and many more can be added by downloading Magento payment module extensions, provided at http://www.magentocommerce.com/magento-connect. More information on installing payment module extensions is provided in the *Extending Magento* section on page 207.

The following shows how to set up some of the most popular payment methods. Setting up other options is just as simple.

To define payments:

1. From the **System** menu, select the **Configuration** option.
2. From the **SALES** section in the panel on the left, select **Payment Methods** to display the following page:

A few payment options are described as follows.

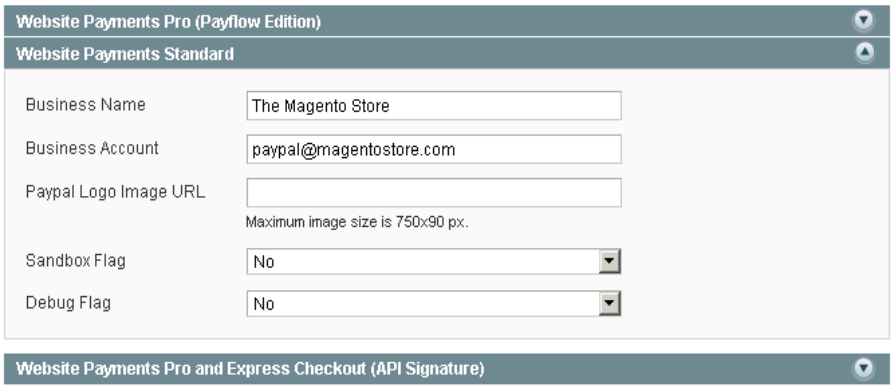
PayPal

PayPal is one of the most basic ways to accept online payments. It enables you to accept credit cards and PayPal accounts.

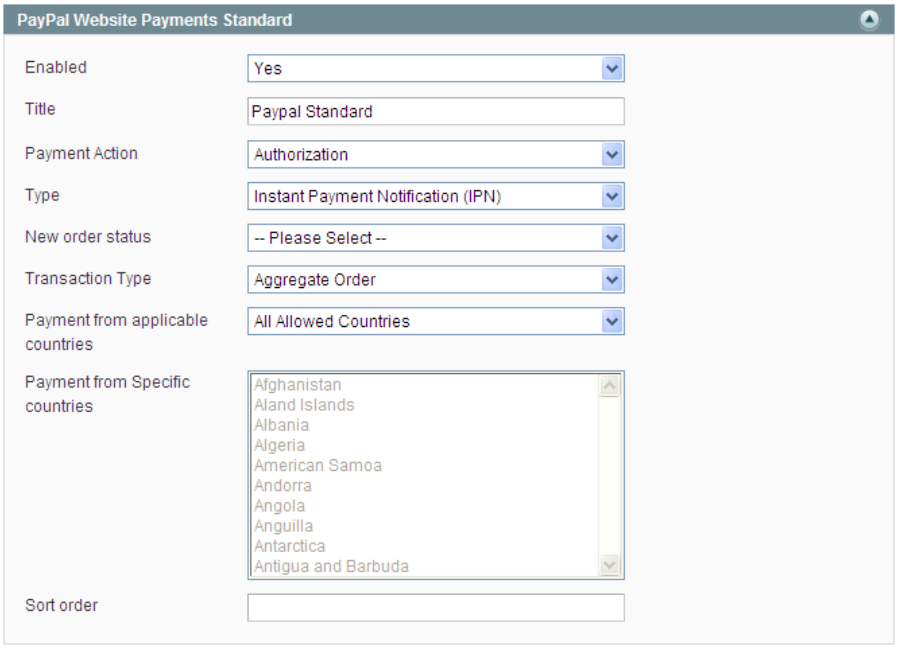
To setup payment by PayPal:

1. Your first step is to create a PayPal business account. Please check with PayPal (www.paypal.com) for detailed instructions.
2. In the Magento backend, in the **System** menu, select the **Configuration** option.
3. Under the **SALES** section select the **PayPal Accounts** option.

4 Expand the **Website Payments Standard** section and specify your business name and the email to use for your web store's PayPal account, as shown below:



5 From the **Sales ➔ Payment Method** section expand the **PayPal Website Payments Standard** configuration, as shown below:



6 In the **Enabled** field, select **Yes**.

7 In the **Title** field, specify a title to be shown to your customers.

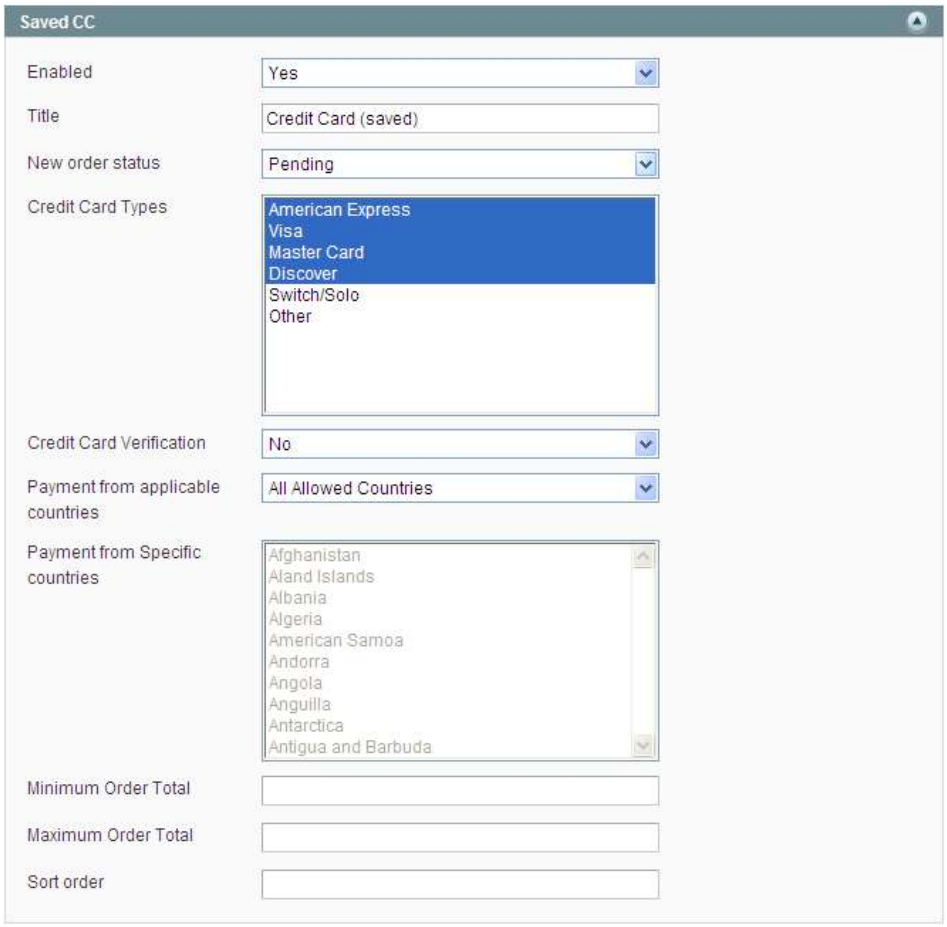
8 In the **Payment Action** field, select one of the following options:

- **Authorization:** Blocks or holds funds in the PayPal account until these funds have been transferred to your account. This usually occurs when you process the Order.
- **Sale:** Specifies that funds are transferred to your account immediately.

Saved Credit Cards

Select the **SALES** option in the panel on the left and then select the **Payment Methods** option.

Expand the **Saved CC** section to define credit cards, as shown below:

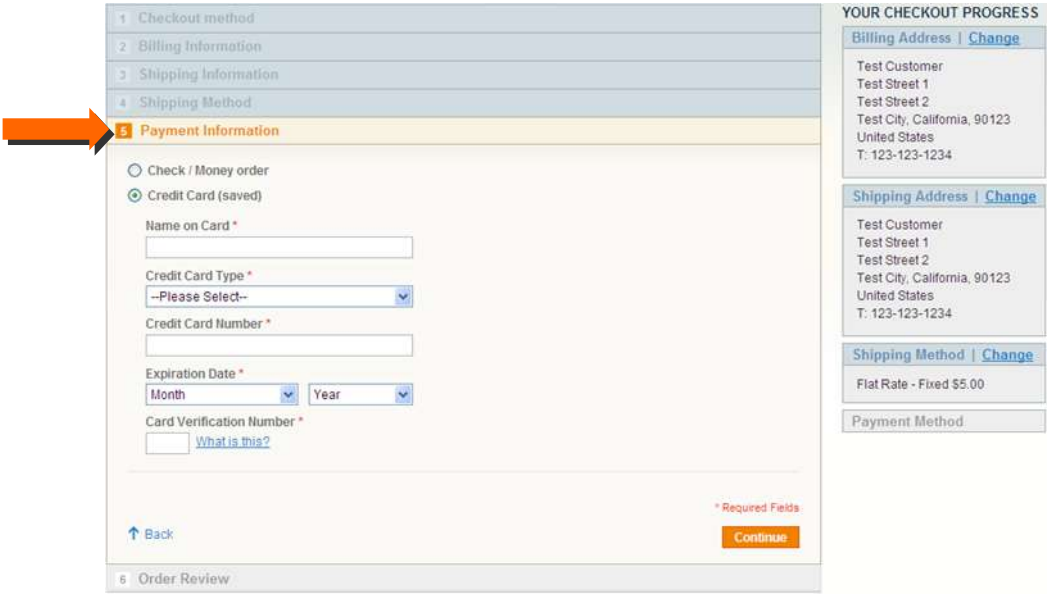


This option enables you to take credit cards and to process them offline. This method is useful when you have a card terminal in a brick and mortar store or have access to a virtual terminal. This payment method is enabled by default in the Sample Data.

Tip: *When using the Credit Cards payment method it is highly recommended to configure an SSL certificate for your web store.*

Note: *Saving customer card data is discouraged unless necessary. Even though the data is encrypted it still poses a security risk to hold this information.*

This option appears as follows in the web store:

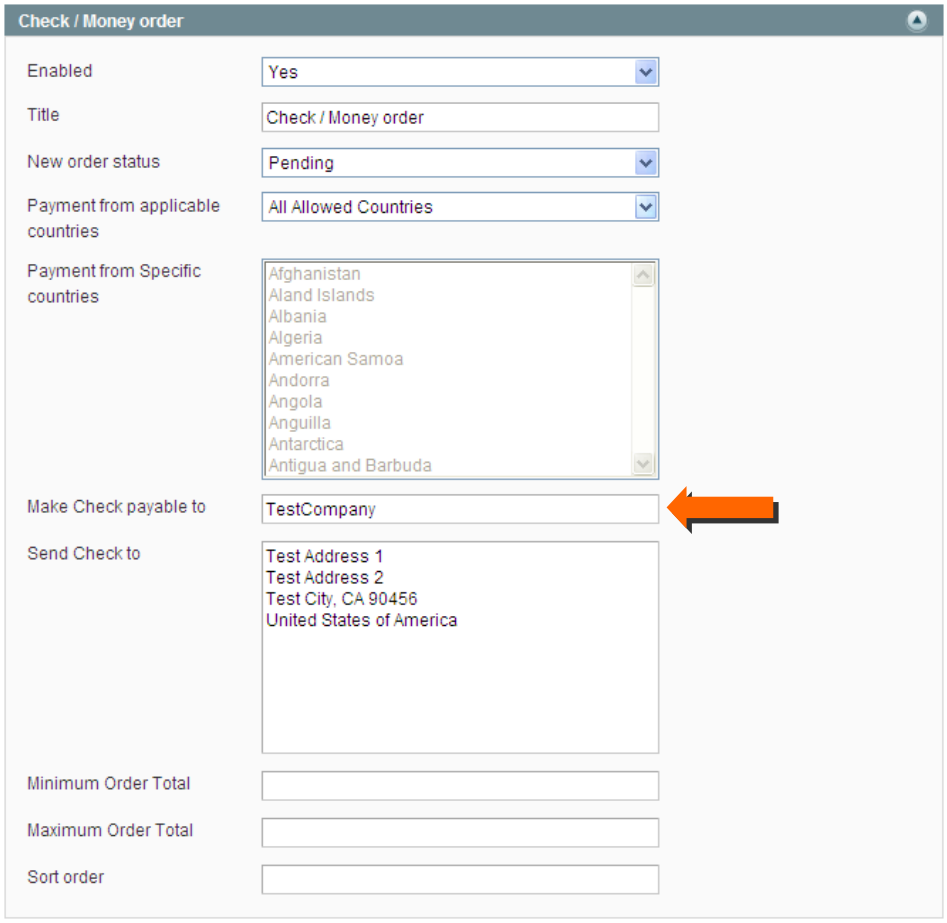


Customers that place an Order in your web store, see their card details as follows. You may refer to *Chapter 9, Managing Orders and Customers* on page 175 for more information about Orders in Magento.

Tip: *You can use the following test credit card number to practice purchasing in your web store:*
Visa 4111111111111111
MasterCard 5555555555554444
American Express 378282246310005
Use any expiration date in the future and as the CVV/CVC/verification code use 123 or 000

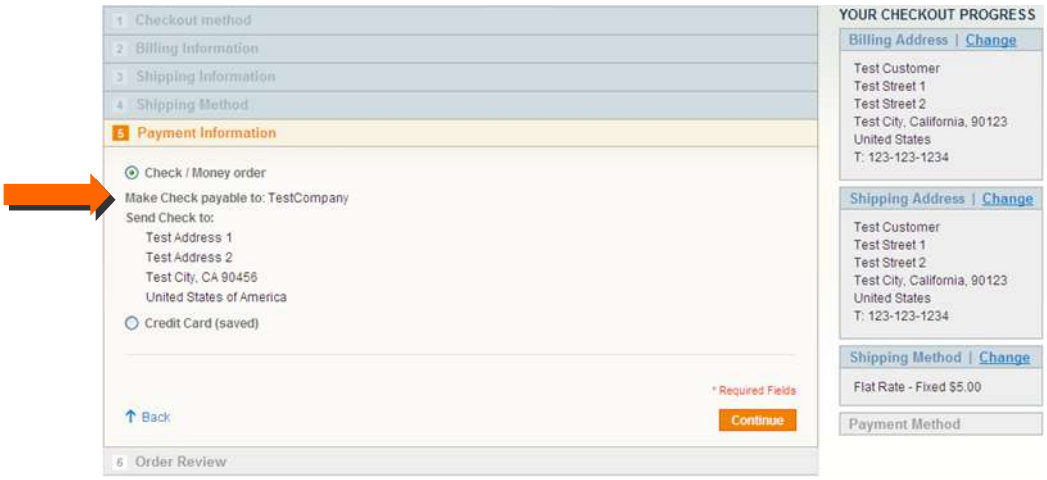
Checks and Money Orders

This payment method is enabled by default in the Sample Data. Expand the **Check/Money Order** section to define how checks and money orders are accepted in your web store, as shown below:



In the **Make Check payable to** field, specify the name of the entity to which the checks must be made out.

This option appears as follows in the web store:



Acquiring Additional Payment Modules

Tip: *Numerous other payment modules are provided at http://www.magentocommerce.com/magento-connect and new ones are uploaded often. More information on installing extensions is provided in the* ***Extending Magento*** *section on page 207.*

7 Design and Content

This chapter describes how to customize the look-and-feel of your web store by applying easy to use options that are provided in the Magento backend. This chapter contains the following sections:

- **Overview,** page 139
- **Changing the Web Store's Default Theme,** page 140
- **Managing CMS Pages,** page 144
- **Customizing Transactional Emails,** page 147

Overview

Magento provides a variety of simple-to-use design options that enable you to apply your own customized look-and-feel to your Magento web store with basic HTML knowledge.

Advanced Tip: *You may refer to http://www.magentocommerce.com/design_guide for a description of how interfaces, themes, skins, layouts and blocks are used and to gain access to resources that will assist in their implementation.*

Changing the Web Store's Default Theme

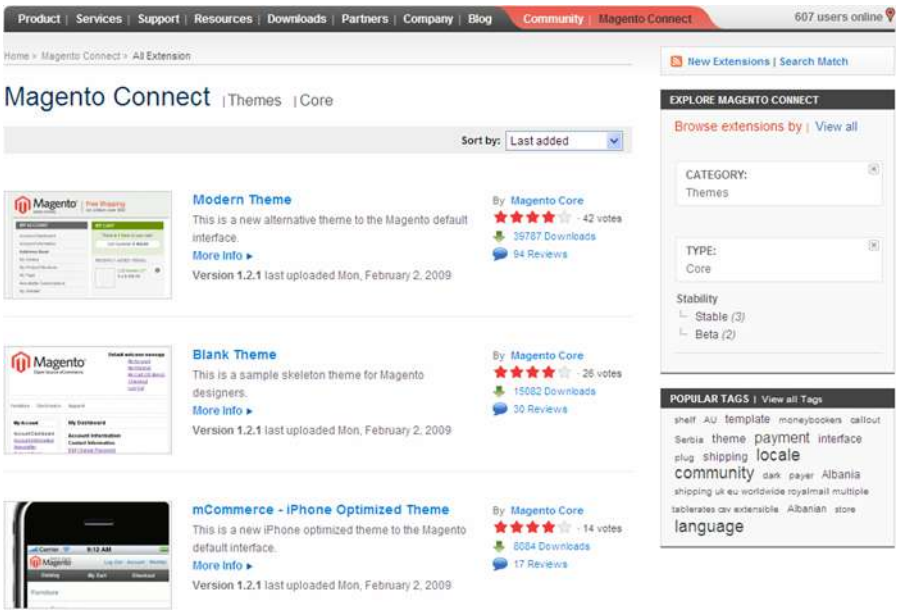
Advanced Tip: *To design your own theme, you may refer to the Magento Designers Guide at http://www.magentocommerce.com/design_guide.*

To change your web store's default theme:

1. Access one of the numerous free and commercial themes provided at http://www.magentocommerce.com/magento-connect. New ones are uploaded often. At the time of writing this guide, over 180 themes were available.

2. Click on the **Themes** link to filter the extensions to themes.

3. Click on the **Core** link to select one of the themes provided by Varien, the Magento company. The themes are then listed in the center of the page, as shown below:



4. Install the theme as any other Magento extension. You may refer to the *Extending Magento* section on page 207 for more information.

5. You can now activate this theme so that the web store appears with a new layout. From the **System** menu, select the **Configuration** option.

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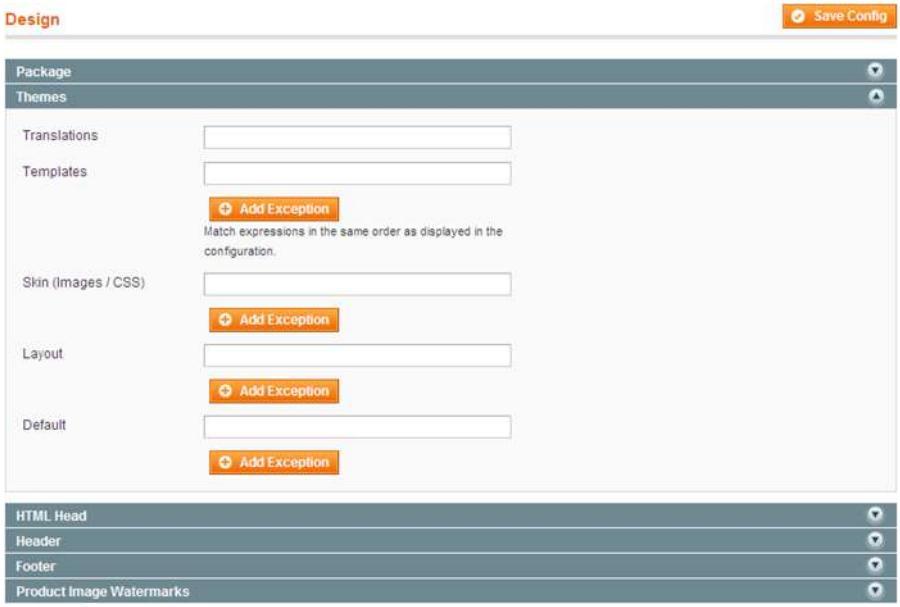
6 In the **GENERAL** area in the panel on the left, select the **Design** option and expand the **Themes** section. The following page is displayed:

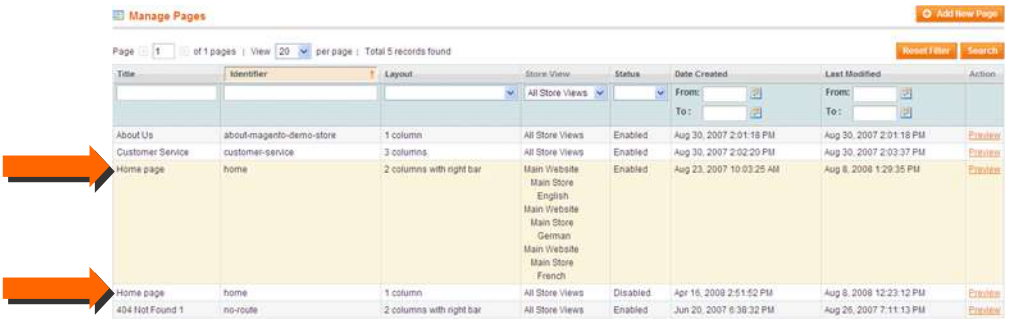


Tip: *The **Add Exception** option enables you to define special themes displayed for users using specific browsers. An example is showing an iPhone optimized theme for users using this device to browse the store.*

7 In the **Themes** section in the **Default** field, specify the name of the theme. In this case it is called **Modern**.

8 Click the **Save Config** button on the top right of the page. The header, footer, menu bar and background of the frontend now look different according to the new theme.

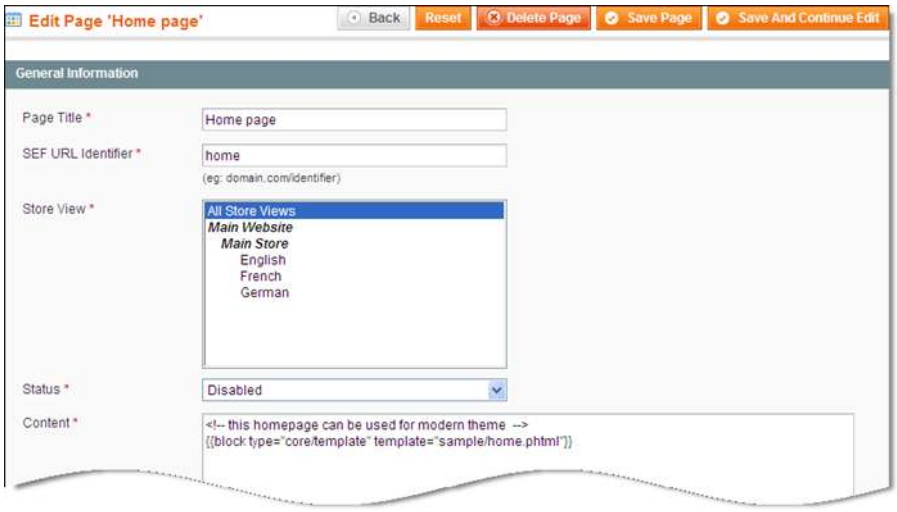
9 If your home page appears incorrect, it may be because the layout that you selected is suited to two columns when your home page has one column or vice versa. For the **Modern** theme, the following change must be applied so that that the frontend home page appears properly. From the **CMS** menu, select the **Manage Pages** option to display the following page:



This page shows two Home Page rows:

- One row has the value **2 columns with right bar** in its **Layout** column and its **Status** column shows **Enabled**.
- The other row has the value **1 column** in its **Layout** column and its **Status** column shows **Disabled**.

10 Click on the first and second rows of the homepage. The following page is displayed for each of them:



- Change the **Enabled** status of the page with **2 columns with right bar** layout to **Disabled**.
- Change the **Disabled** status of the page with **1 column** layout to **Enabled**. The homepage of the frontend now appears similar to the following page:

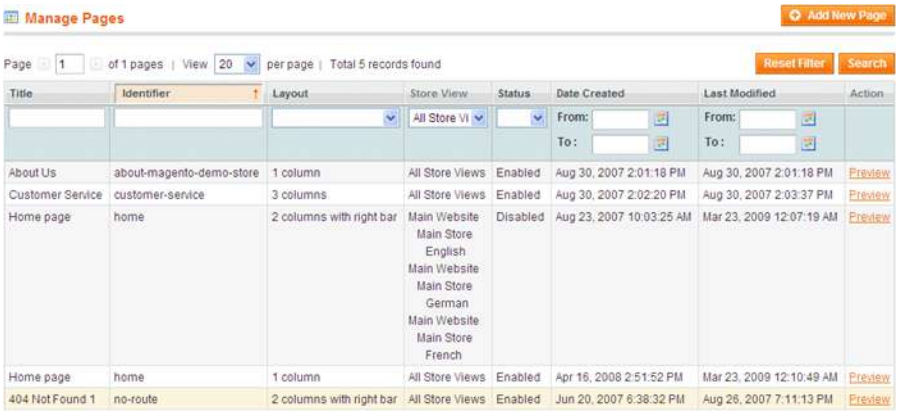
Managing CMS Pages

CMS (Content Management System) pages are static pages such as your **Homepage**, **About Us** and **Customer Service** pages that provide information about the web store and are managed through the Backend panel. CMS Pages are full pages that are available via their own URL addresses. Static Blocks are sections of code or graphics that can be referenced inside CMS pages as well as Category landing pages. They are page elements that can be reused and referenced throughout your site. .

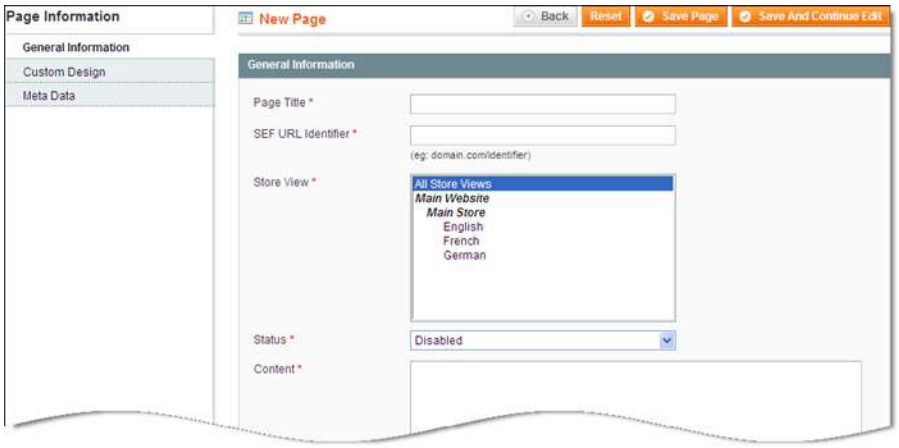
The following example shows how to create a new page in Magento and then how to create a link to it from your store footer.

To add a CMS page:

1. From the **CMS** menu, select the **Manage Pages** option to display the list of currently defined CMS pages as displayed below.



2 Click the **Add New Page** button on the top right of the page to display the following page:



3 In the **Page Title** field, specify the words to appear in the browser's title bar.

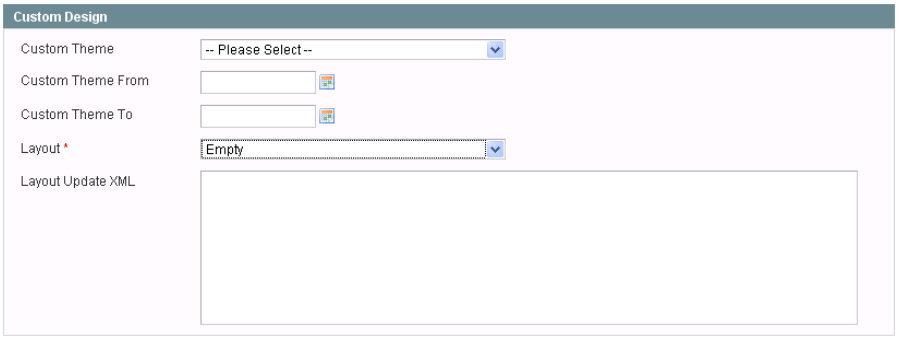
4 In the **SEF URL Identifier** field, specify the unique identifier to be used in the URL. It must contain all lower case letters and no spaces. The following example uses **Our History**.

5 Leave the default value in the **Store View** field.

6 In the **Status** field, select **Enabled**.

7 In the **Content** field, enter the HTML code to be presented in this page.

8 Click the **Custom Design** option to display the following:



9 Click the **Layout** field and then select one of the following options:

- **Empty:** Shows the content of an empty page with no Magento header, footer or side bars.
- **1 Column:** Displays all the content entered in a single central column with Magento header and footer.

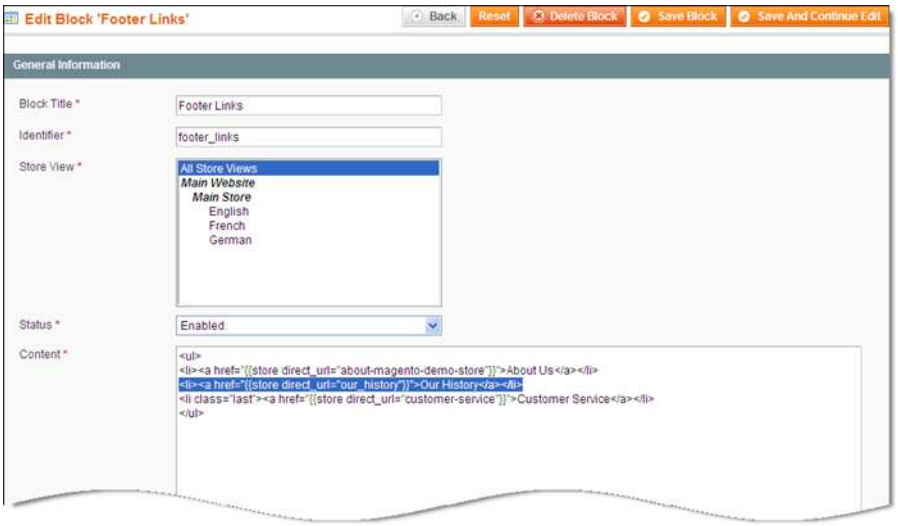
- **2 Columns with left/right bar:** Displays all the content entered on the page with Magento header, footer and left/right bar.
- **3 columns:** Displays both the left and right columns from the design package with the content shown between.

10 You can now open a browser and browse to this Landing page. The URL is taken from the value you entered in the **SEF URL Identifier**, as described above. For example: **/our_history** is added to the web store's URL.

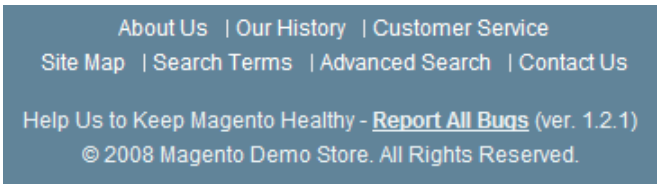
11 The following shows how to add a link to this page from the frontend's footer. From the **CMS** menu, select the **Static Blocks** option to display the list of existing Static Blocks.

12 Click on the **Footer Links** row to display the definition of the frontend's footer.

13 In the **Content** field, add a link to the new page in the HTML code. You can do so by copying one of the existing links to a page in the HTML code and then changing the name of the page to which it links, as shown below:



The footer of the frontend now appears as follows:



Customizing Transactional Emails

Transactional Emails are all emails sent from a Magento store. Magento offers flexible and easy-to-use functionality to enable you to customize these emails and translate them into multiple languages to best use them for communication with your customers.

This section describes how to modify the emails that are sent from the web store, for example, when an account is created or an Order is placed.

To customize a transactional email template:

1. From the **System** menu, select the **Transactional emails** option to display a list of the custom email templates created in this web store.

   Note: *This page shows only customized emails. When this page is empty, it means that Magento will only send standard default emails.*

2. Click the **Add New Template** button to display the Template Editing page.
3. In the **Template** field, select the name of one of the transactional emails that you want to customize, such as **New account**.
4. In the **Locale** field, select the language.
5. Click the **Load Template** button to display the default template's HTML code in the **Template Content** area. You must change the contact phone number and email address as well as the logo image reference at the top of the page to reflect your own store information in all active templates.
6. Click the **Save Template** button.
7. Now that your customized email template is ready and available, the next step is to inform Magento that it should send this email to customers instead of the default email. This is controlled in various configuration sections depending on the type of email.

   In our example of customizing a New Account email, select **System ➔ Configuration ➔ Customers ➔ Customer Configuration**. Then expand the **Create New Account Options** section and select your newly customized transactional email in the **Default Welcome Email** field.

This page was intentionally left blank.

8 Promotions

This chapter describes a variety of ways to promote your products. This chapter contains the following sections:

- **Overview,** page 149
- **Up-selling, Related Products and Cross-selling,** page 150
- **Catalog and Shopping Cart Price Rules,** page 156
- **Special Prices**, page 167
- **Tier Pricing,** page 167
- **Newsletters,** page 171

Overview

Magento offers a variety of ways to promote your products. These include options for presenting additional products in order to increase conversion rates and for providing various discounts and promotions. The possibilities are endless!

Up-selling, Related Products and Cross-selling

Three types of product promotion selling options are provided in Magento: Up-sell products, Related products and Cross-sell products.

- **Up-sell Products:** When a customer views a product, the **Up-sells** for this product are items that your customer could buy *instead* of the product that is being viewed. These products may be of a better quality, more expensive, more popular, produce a higher profit margin and so on. These products appear on the Product Information page.
- **Related Products**: Related products appear in the Product Information page in the right column. Related products are meant to be purchased **in addition** to the item the customer is viewing.
- **Cross-sell Products:** Products that are promoted in the shopping cart page right before checkout. When a customer navigates to the shopping cart (whether automatically after adding a product or otherwise), these products are offered as suggestions in addition to the products already in the shopping cart. They are similar to impulse buys, like magazines and candy at the cash registers in grocery stores.

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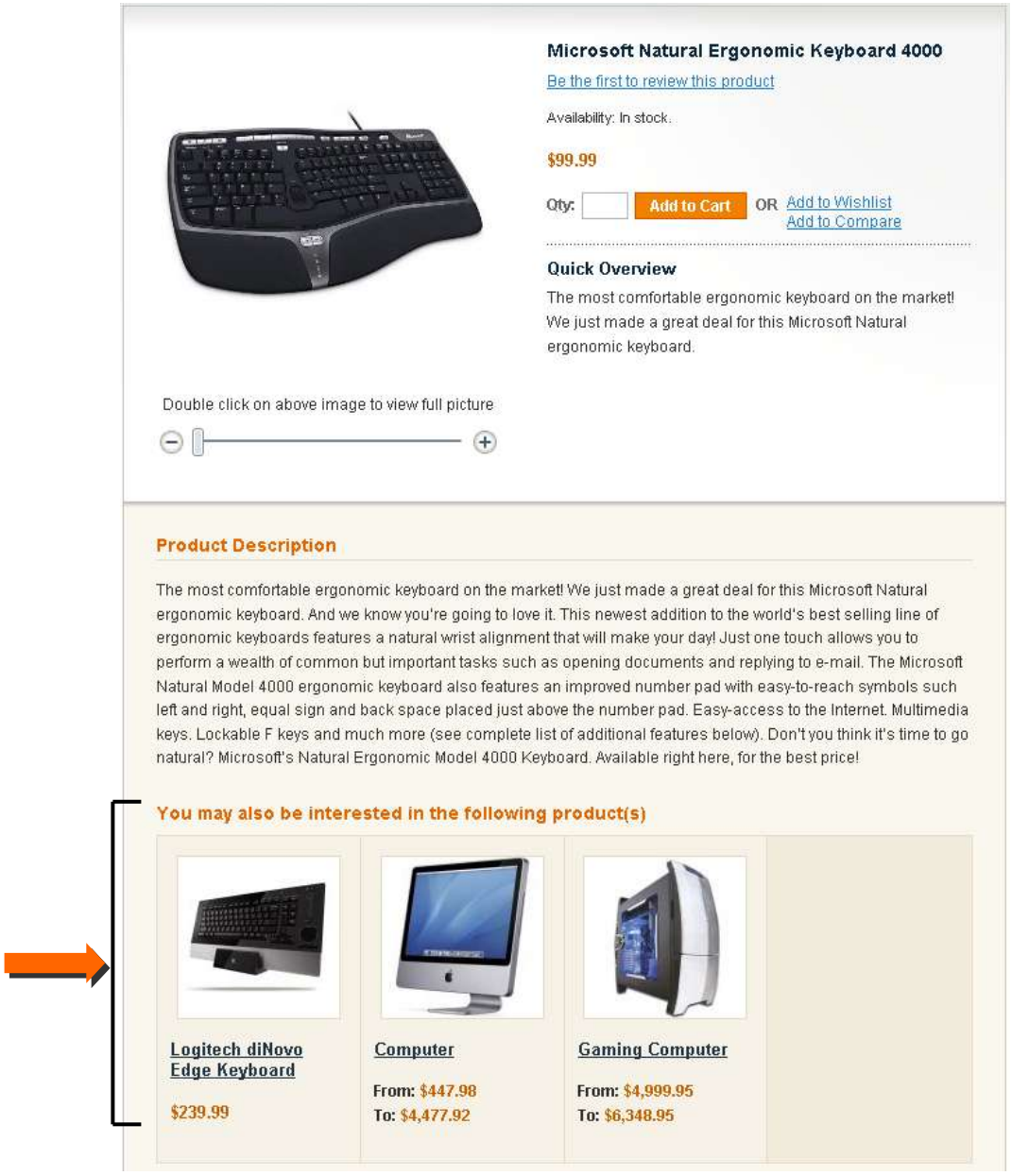
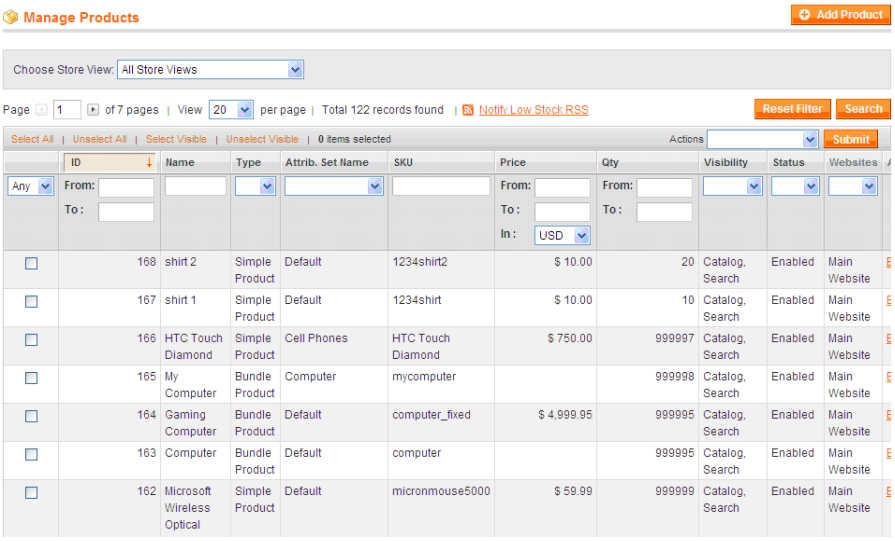
Up-sells

The up-sell products appear in the Product Information page under the **Product Description**, as shown below. This example presents a more expensive keyboard and other products as up-sells to the less expensive keyboard.

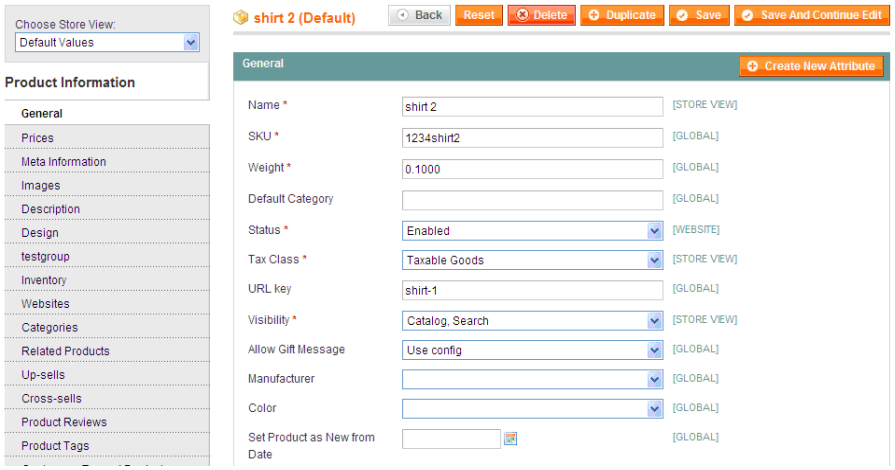


To add Up-sells to a product:

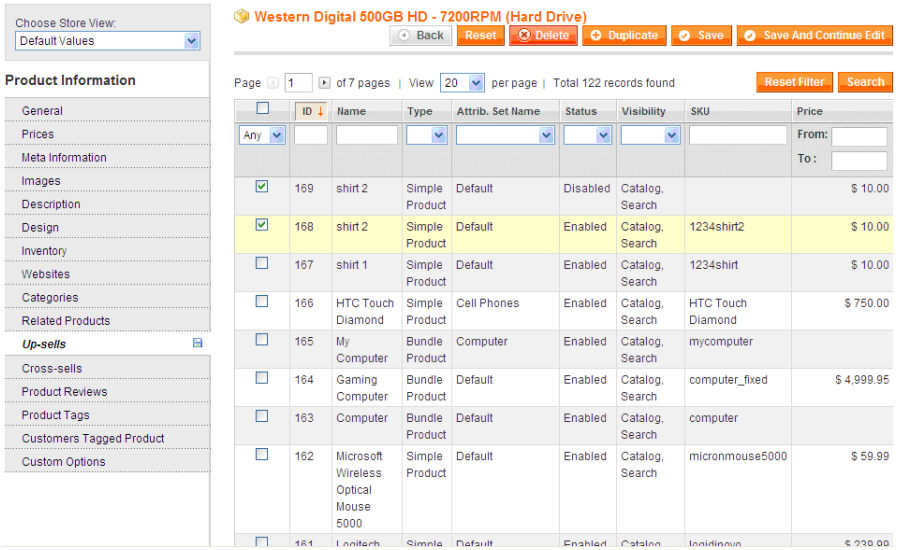
1. In the backend, from the **Catalog** menu, select the **Manage Products** option to display a list of products, as shown below:



2. Click the **Edit** link which appears on the right side of the row of the product for which you want to define Up-sells. The following page is displayed:



3 Select the **Up-sells** tab in the panel on the left.



Tip: *By default the list shows only products that were already selected as up-sells. If there are none or you want to add other products, click the* ***Reset Filter*** *button to display a list of all the products.*

4 Select the products to appear as up-sells to this product.

5 Click the **Save** button.

Related Products

Related Products are shown in the right column of your web store in a separate block. The following example shows a mouse product that was added as a Related Product for a keyboard purchase.

To add Related Products to a product:

1. In the backend, from the **Catalog** menu, select the **Manage Products** option to display a list of products.
2. Click the **Edit** link which appears on the right side of the row of the product for which you want to define Related Products.
3. Select the **Related Products** tab in the panel on the left to display the Product Listing page.

   Tip: *By default the list shows only products that were already selected as Related Products. If there are none or you want to add other products, click the* ***Reset Filter*** *button to display a list of all the products.*

4. Select the products to appear as Related Products to this product.
5. Click the **Save** button.

Cross-sells

Cross-sell products are shown in a block below the shopping cart products, as shown below:

Cross-sell products are displayed after a product has already been added to the shopping cart. By default, three products are randomly selected by Magento from the products that have been defined as Cross-sell products of all the products in the shopping cart.

To add Cross-sell products to a product:

1. In the backend, from the **Catalog** menu, select the **Manage Products** option to display a list of products.
2. Click the **Edit** link which appears on the right side of the row of the product for which you want to define Cross-sell Products.
3. Select the **Cross-sells** tab in the panel on the left to display the page listing all assigned products.

   Tip: *By default the list shows only products already selected as cross-sells. If there are none, or you want to add other products, click the* ***Reset Filter*** *button to display a list of all the products.*
4. Select the products to appear as Cross-sell Products to this product.
5. Click the **Save** button.

Catalog and Shopping Cart Price Rules

There are two types of price rules in Magento: **Catalog Price Rules,** as described below and **Shopping Cart Price Rules,** as described on page 161. Catalog Rules are applied to products before they are added to the shopping cart, while Shopping Cart Price Rules are applied to products in the shopping cart.

Catalog Price Rules

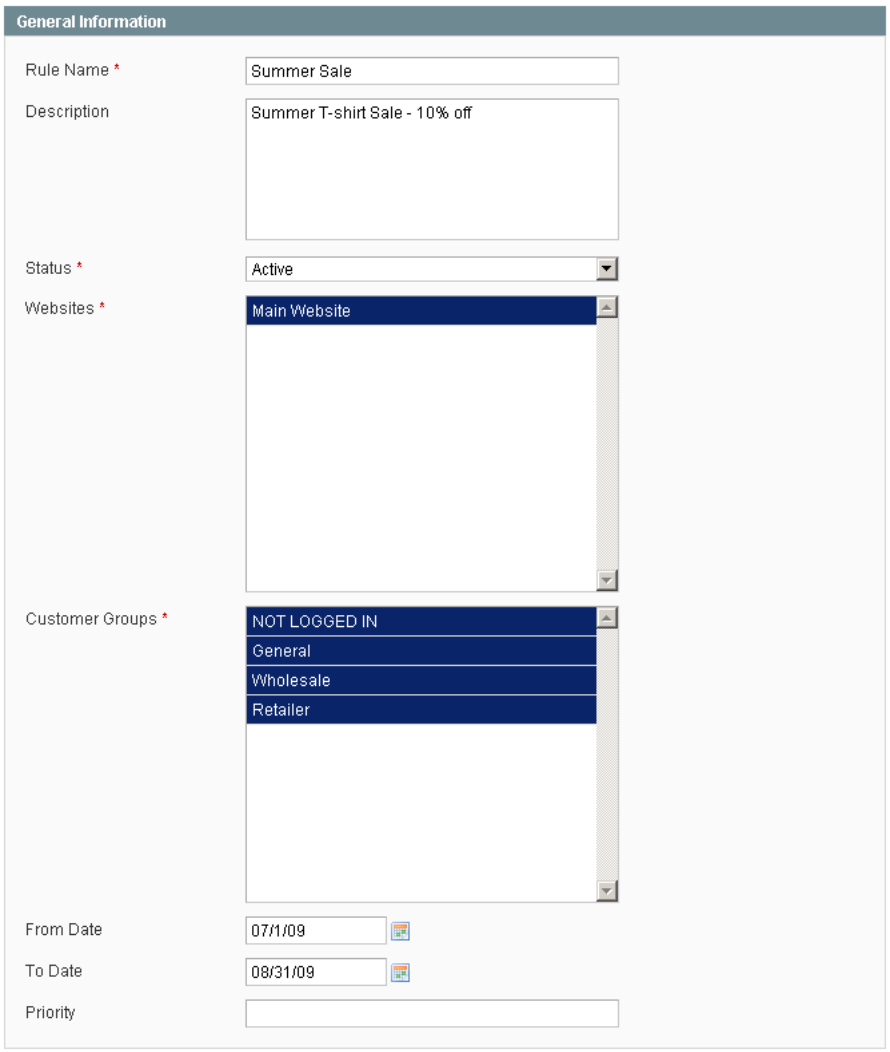
Catalog Price Rules are applied to products before they are added to a shopping cart. They can be used to create sales and discounts that do not require that a discount code be entered by the customer. The process of defining a **Catalog Price Rule** is comprised of three stages:

- **Defining the Catalog Price Rule Information,** page 157, defines general information about this rule.
- **Defining the Catalog Price Rule Conditions,** page 158, defines the conditions that trigger the rule.
- **Defining the Catalog Price Rule Actions,** page 160, defines the actions that are executed when the conditions of this rule are met.

Defining the Catalog Price Rule Information

To create a Catalog Price Rule:

1. From the **Promotions** menu, select the **Catalog Price Rules** option and then select the **Add New Rule** button to display the following page:



2. Fill in the **Rule Name** field and the **Description** field for this Catalog Price Rule.

3. In the **Status** field, select **Active**.

4. In the **Websites** field, select the website to which this rule applies.

5 In the **Customer Groups** field, select the customer groups to which this rule applies.

6 In the **From Date** and **To Date** fields, set a date range for the rule to take effect. If you leave the date range empty, then the rule is enabled as soon as it is created.

> ***Advanced Tip:*** *You can use the* ***Priority*** *field (****1*** *is the highest priority) when there are multiple rules. This determines which rule takes effect when more than one* ***Catalog Price Rule*** *applies.*

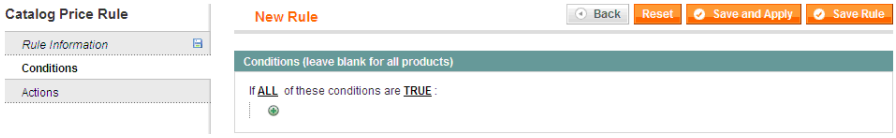
Defining the Catalog Price Rule Conditions

Once you have set up the general information for the price rule, you must create the conditions that specify when the rule is triggered.

The following example shows how to discount every T-shirt that is over $20 by 10% by defining a rule that has two Conditions.

To define Catalog Price Rule Conditions:

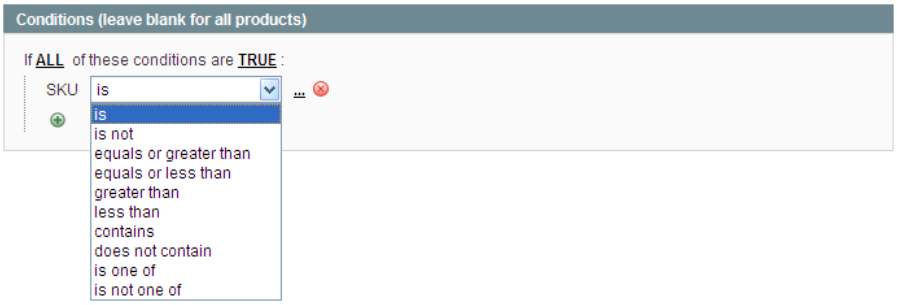
1 Select the **Conditions** option in the panel on the left to display the following page:



2 The first rule appears by default: **If ALL these Conditions are TRUE**. It specifies whether the rules that you define must **all** be met or if **any** of them can be met (AND or OR) in order to trigger the rule's action. In our example, we wanted the discount to take effect when the product is either a T-shirt **or** when the product costs over $20. Therefore, click on the word **ALL** in the page above and select **ANY**.

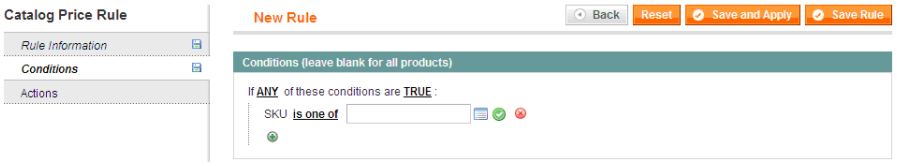
3 Click on the icon to display a selection field and select the **SKU** option under **Product Attributes** from the dropdown menu. The following page is displayed:

4 Click on the **is** link to display the following:

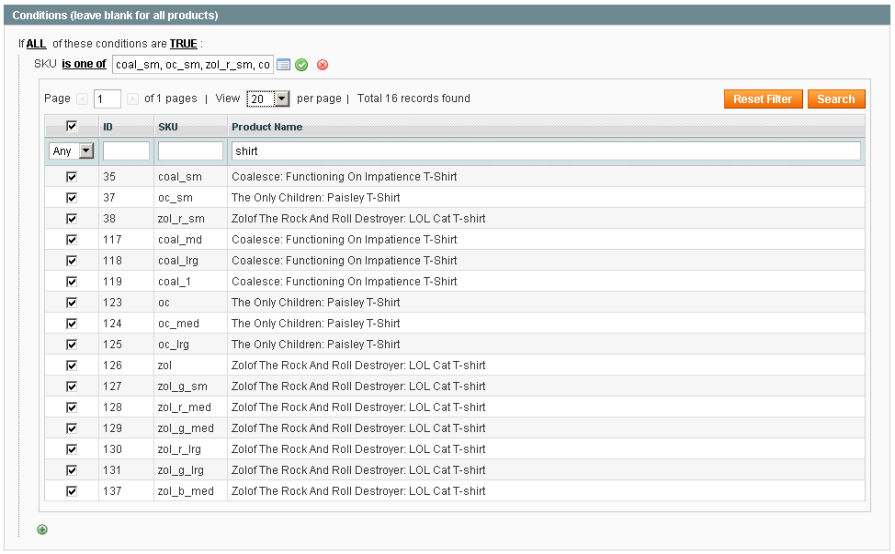


5 Select **is one of,** as shown above.

6 Click on the three dots to the right of the words **is one of** to display the following:



7 Click on the **Chooser** icon to display a list of products from which you can select, as shown below:



The page above shows the list of products filtered to show only those that have the word **Shirt** in their name.

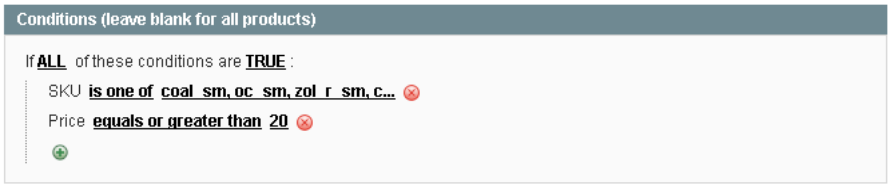
8 Check the checkboxes of the products to which this rule is to apply.

9 Save this selection of products by clicking the **Apply** icon .

10 Now this rule specifies that it applies to T-shirts. You must now add the Condition that the product must cost over $20 in order for the rule to apply. To do so, click on the icon to display a selection field and select the **Price** option under **Product Attributes** from the dropdown menu.

11 Click on the **is** link and select **equals or greater than** from the **Condition** dropdown menu.

12 Enter the value 20.00 in the field on the right to create the second Condition, as shown below:

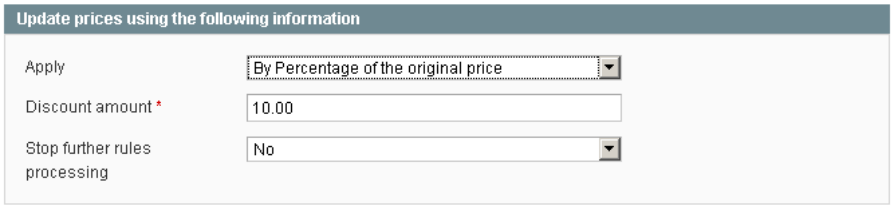


Defining the Catalog Price Rule Actions

Now that the Conditions have been defined that trigger this rule, we must define the Actions to be triggered when the Conditions are met. The following defines that T-shirts are discounted by 10%.

To define Catalog Price Rule Actions:

1 Select the **Actions** option in the panel on the left to display the following page:



2 The **Apply** dropdown menu enables you to define whether the discount specified in the **Discount amount** field is a percentage or a fixed amount of the price of this product. It also enables you to define whether the discount amount is subtracted from the original price (**By**) or whether the **Discount amount** field actually defines the final price (**To**). For our example, in the **Apply** field, select **By Percentage of the original price** and enter the value **10.00**. This defines a final price that is a 10% reduction of the original price.

> ***Note:*** *Mistakenly selecting the* ***To Percentage of the original price*** *option would give a final price that is equal to 10% of the original price, meaning a 90% reduction.*

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3 Select the **Save Rule** button to create the rule.

4 You must also select either the **Save and Apply** or the **Apply Rules** button to immediately apply this discount to the selected products.

> ***Note:*** *As you add new rules, the system must recalculate the prices and the priorities of the rules. Generally, system rules are automatically processed and applied each night. In order to apply a new rule immediately, you must select one of these* ***Apply*** *buttons.*

Shopping Cart Price Rules

Shopping Cart Price Rules, as the name implies, are applied when a customer reaches the shopping cart. They can be applied either with or without the customer entering a coupon code, and include features not found in traditional coupon tools. This example defines a simple 10% discount coupon to be used for clogs when the shopping cart subtotal is over $100.

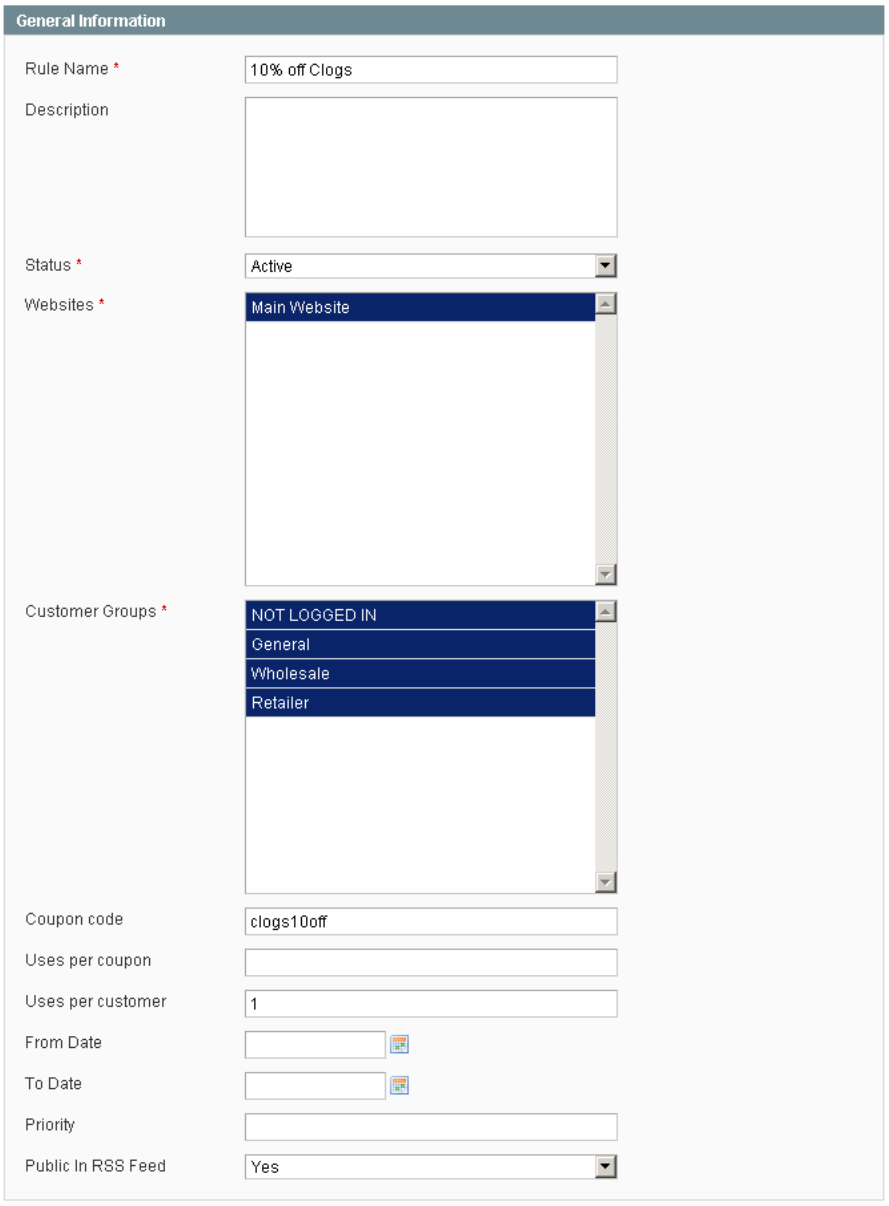
The process of defining a **Cart Price Rule** is comprised of three stages:

- **Defining the Cart Price Rule Information,** page 162, defines general information about this rule.
- **Defining the Cart Price Rule Conditions,** page 163, defines the Conditions that trigger the rule.
- **Defining the Cart Price Rule Actions,** page 164, defines the Actions that are executed when the Conditions of this rule are met.

Defining the Cart Price Rule Information

To create a Cart Price Rule:

1. From the **Promotions** menu, select the **Cart Price Rules** option and then select the **Add New Rule** button to display the following page:



2. Fill in the **Rule Name** field and the **Description** field for this Cart Price Rule.

3. In the **Status** field, select **Active**.

4 In the **Website** field, select the website to which this coupon applies.

5 This rule only applies when a coupon code is used, so in the **Coupon Code** field, specify the code of the coupon that can be entered in the web store by the customer.

> ***Note:*** *If you do not enter anything in the* ***Coupon Code*** *field, when the customer reaches the shopping cart, the discount is applied any action being taken.*

6 To define that each customer can only use this coupon once, in the **Uses Per Coupon** field**,** enter **1** and in the **Uses Per Customer** field, enter **1**.

> ***Tip:*** *If we would like to create a limited offer, the coupon can be limited to be used 100 times by entering the value 100 in the* ***Uses per coupon*** *field.*

7 In the **From Date** and **To Date** fields, set a date range for the rule to take effect. If you leave the date range empty, then the rule is enabled as soon as it is created.

> ***Advanced Tip:*** *You can use the* ***Priority*** *field (**1** is the highest priority) when there are multiple rules. It determines which rule takes effect when more than one Cart Price Rule applies.*

Defining the Cart Price Rule Conditions

Once you have set up the general information for the price rule, you create the Conditions that specify when the rule is triggered. The following example shows how to create a rule that has one Condition, which checks when the shopping cart subtotal is over $100.

To define Catalog Price Rule Conditions:

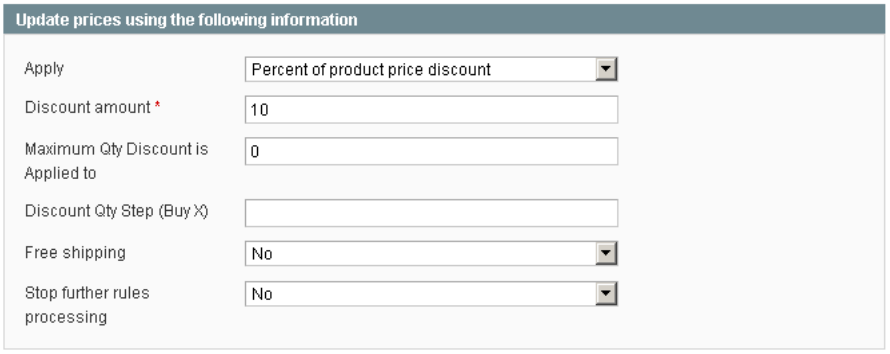
Select the **Conditions** option in the panel on the left and define the following rule:

Defining the Cart Price Rule Actions

Now that the Condition has been defined that triggers this rule, you must define the Actions to be triggered. The following defines that 10% is reduced from the product's original price.

To define Cart Price Rule Actions:

1. Select the **Actions** option in the panel on the left to display the following page:



2. The **Action** tab has two important sections. The first one controls the discount. In the **Apply** field, select **Percent of product price discount**.

3. In the **Discount amount** field, enter **10** to indicate that 10% is reduced from the product's original price.

> ***Tip:*** *Other options, not related to this example are available, such as: Fixed amount discount, Fixed amount discount for whole shopping cart and Buy X get Y free.*

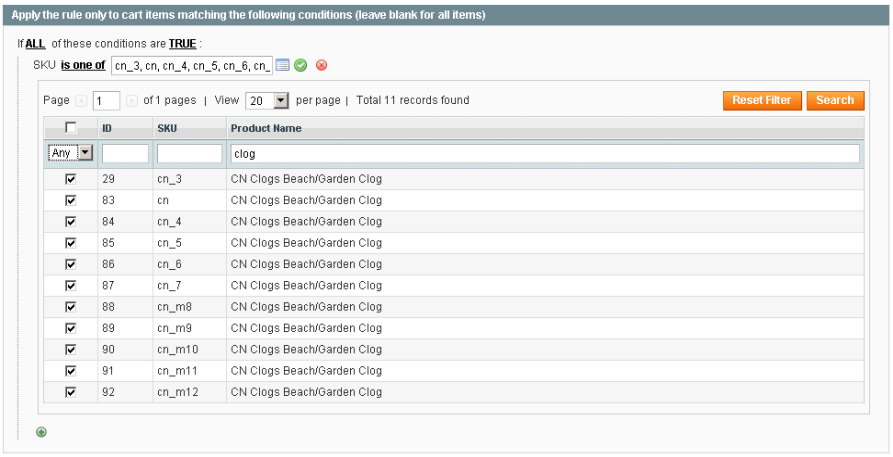
4. In the **Maximum Qty Discount is Applied to** field, specify the maximum quantity of products to which this discount can be applied. If you enter **5** in this field, then the first five products of this type purchased in the same shopping cart get the 10% discount and the sixth product of the same type does not get the discount.

5. In the **Discount Qty Step (Buy X)** field, specify how often the discount is applied. This field is not relevant to our example, so leave this field empty. If you enter 8 here, then a 10% discount is applied to all the products after the eighth product is added to the shopping cart. If more than eight items are added to the shopping cart, the ninth through 15th products do not get the discount until the 16th product is added to the shopping cart, at which point the discount is 10% for all 16 products. This discount continues for every factor of eight and is useful for products sold in packages of eight.

6 In the **Free Shipping** field, specify whether to combine the coupon amount with a free shipping offer, for only the products for which the coupon is valid or for the entire Order, when one of these products is in the shopping cart. This field is not relevant to our example, so leave the **No** value in this field.

7 After defining the coupon as described above, select the products for which the coupon is valid. In our example, the coupon discount applies to clogs.

8 Define a Condition that applies to the SKU of clogs, as shown below:



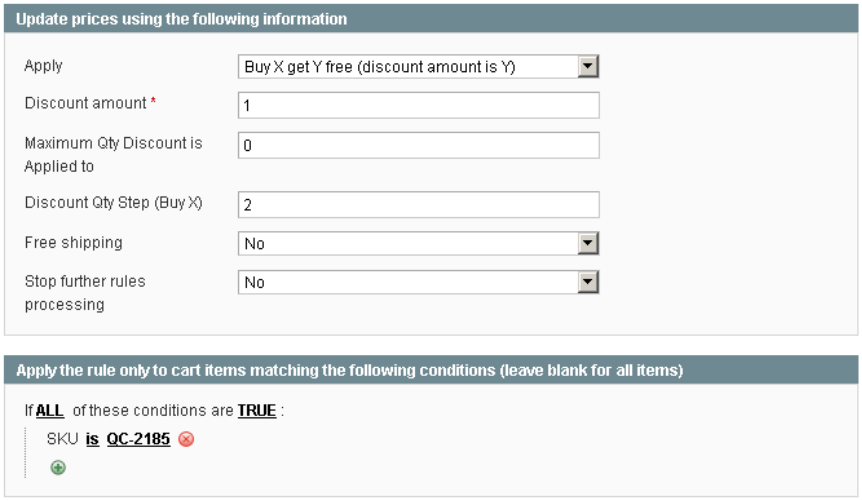
9 Click the **Save Rule** button.

Example: Defining a Buy 2 Get 1 Free Promotion

This section describes how to create another discount coupon with a **Buy 2 get 1 free** promotion. In this example, the web store is trying to push a digital camera as a family deal. This is a Shopping Cart Price rule.

To define a Buy 2 get 1 free promotion:

1. Define the **Coupon Information**, as described above, but leave the **Coupon Code** field blank. This defines that the discount takes effect as soon as a customer adds the products to the shopping cart.



2. Do not define any Conditions because this rule is always applied to the Digital Camera. The deal is created for the Argus QC-2185 Quick Click 5MP Digital Camera available in the Magento Sample Data.

3. Define the Actions to be triggered when the Condition above is met. In the **Apply** field, select the **Buy X get Y free** option.

4. Click the **Save Rule** button.

   You can now send out your marketing message telling customers that if they buy 3 Argus QC-2185 Quick Click 5MP Digital Cameras one of them will be free.

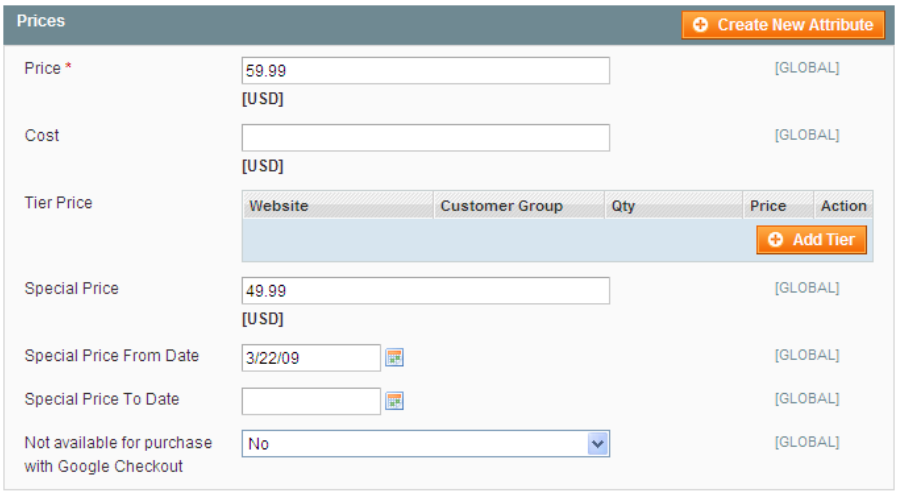
> ***Tip:*** *It is good practice to test the effect of these rules yourself before trying them out on the public. Either use a discount code that only you know or assign your test customer to a testing customer group and limit the cart rules to only that customer group.*

Special Prices

Special prices enable you to define a discounted price for a product for a specified period of time.

To define Special Price:

1. From the **Catalog** menu, select the **Manage Products** option to display a list of products.
2. Click the **Edit** link on the right side of the relevant product's row.
3. Click the **Prices** tab in the panel on the left.



4. In the **Special Price** field, enter the special price.

2 Optionally, set **Special Price From** / **To Date**. If you leave these fields blank, the special price is applied immediately and applies until removed on the same page.

The special price is shown on home page as follows:

Microsoft Wireless Optical Mouse 5000

Regular Price: ~~$59.99~~

Special Price: $49.99

Add to Cart

Add to Wishlist

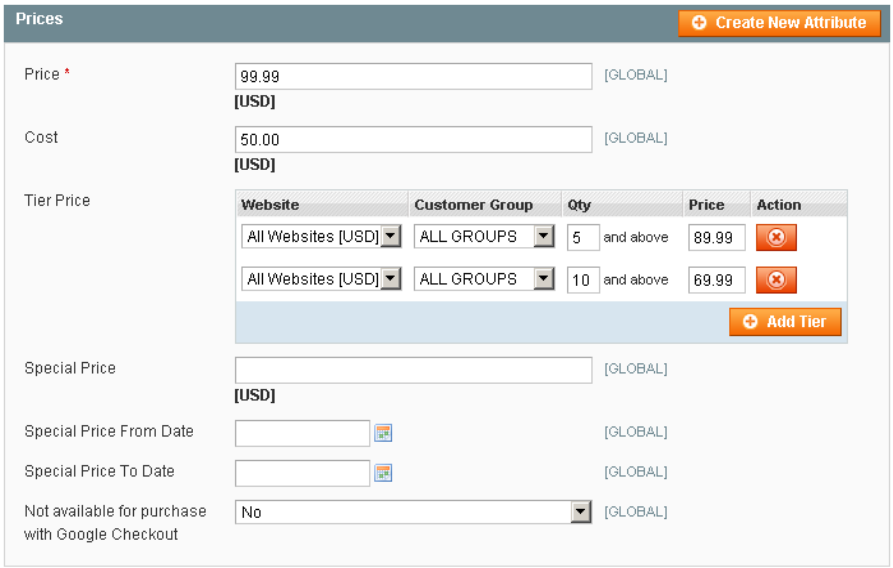
Add to Compare

Tier Pricing

Tier Pricing is a promotional tool that enables a web storeowner to price products differently when higher quantities are purchased. This is an effective way to move more merchandise and appeal to customers who buy more than one product at a time. When a customer adds a certain quantity of a product to their shopping cart, the price is automatically changed to reflect the discount.

To define Tier Pricing:

1. From the **Catalog** menu, select the **Manage Products** option to display a list of products.
2. Click the **Edit** link on the right side of the relevant product's row.
3. Click the **Prices** tab in the panel on the left.

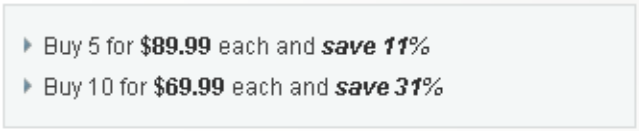


4. Add tiers by clicking the **Add Tier** button.

> ***Tip:*** *To apply a tier to multiple groups, but not all groups, create multiple tiers, each with the same Qty and Price information and select a different customer group in each.*

The prices on the frontend take precedence from the highest to the lowest quantity. Therefore, if you have a tier for the quantity 5 and one for the quantity 10 and a customer adds 5, 6, 7, 8 or 9 items to the shopping cart, then the customer gets the discounted price that you specified for the quantity 5 tier. As soon as the customer adds the 10th item, the discounted price specified for the quantity 10 tier supersedes the quantity 5 tier and that discounted price (of 10) applies instead.

After saving the product, it shows the following Tier Pricing block on the frontend:



On the product listing pages, the best available deal is displayed below the regular price, as shown below:

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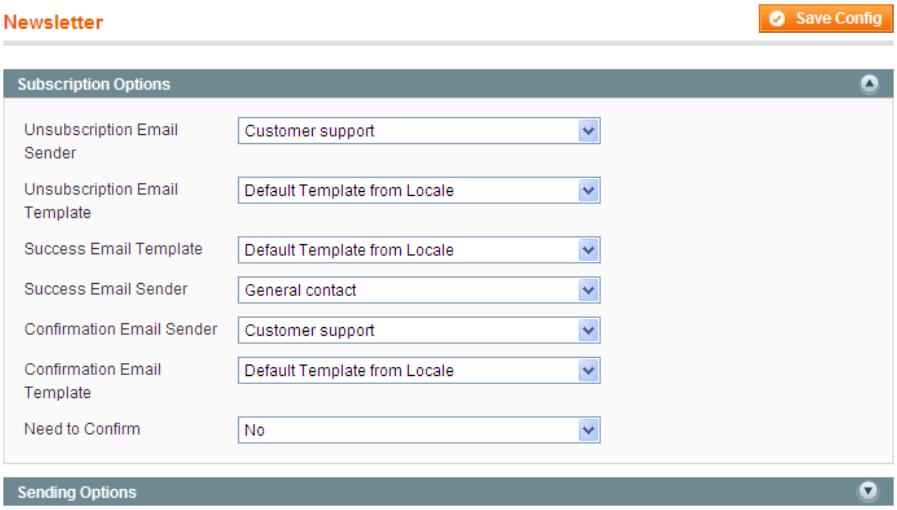
Newsletters

Magento provides a Newsletter functionality, which enables store administrators to send newsletters to customers who have registered to receive them.

The first step in creating newsletters is to configure the newsletter settings for your site.

To configure newsletter settings on your site:

1. From the **System** menu, select the **Configuration** option to display the configuration page.
2. From the **CUSTOMERS** area in the panel on the left, select the **Newsletter** option and expand the **Subscription Options** area to display the following page:



3. In the **Need to Confirm** field, select **Yes** to specify that each customer that registers for a newsletter will receive an email asking them to confirm their registration. This technique is called double opt-in, meaning that customers confirm that they want to receive a newsletter twice. This method reduces the number of customers that consider your newsletter as spam.

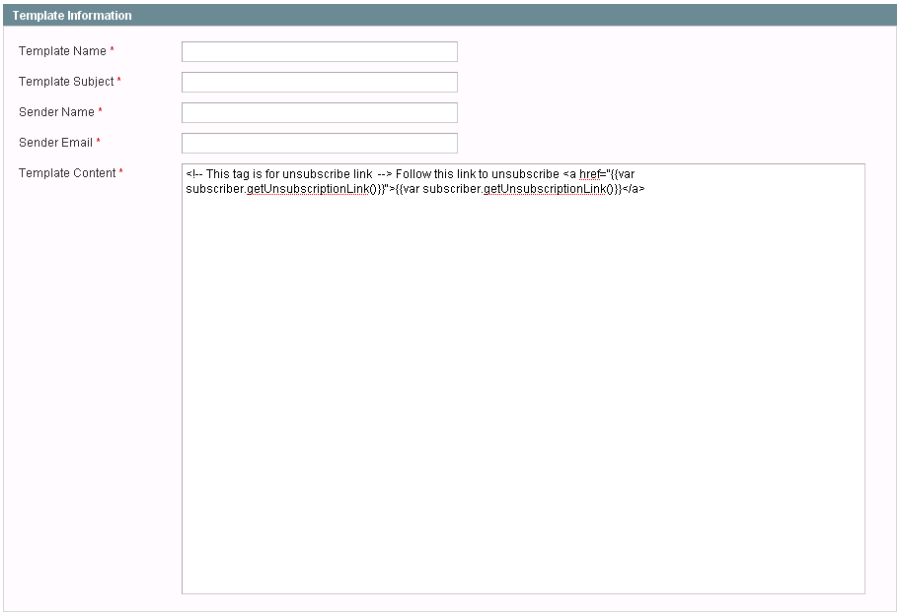
Newsletter Templates

Before sending a newsletter, create a newsletter template. You can create and save as many of these as required for any situation, whether it be an annual holiday newsletter or weekly product updates.

To create a new newsletter template:

1. From the **Newsletter** menu, select the **Newsletter Templates** option to display a page listing the previously defined newsletter templates. You can edit an existing template or create a new one.

2. To add a new template, click the **Add New Template** button to display the following page:



3. In the **Template Name** field, enter a unique and indicative name for this template. This value is not visible for customers.

4. In the **Template Subject** field, specify the subject of the email to be sent to your customers.

5. In the **Sender Name** and **Sender Email** fields, specify the name and email of the sender of the email to be sent to your customers.

6 In the **Template Content** field, enter the HTML code of the body of the email. Note that this field is pre-filled with tags showing an unsubscribe link in the email. We recommend that you do not remove this link so that all emails that are sent enable your customers to unsubscribe from the newsletter.

7 Click **Preview Template,** to display the content with the HTML tags formatting as will be viewed by your subscribers.

8 After you have finished editing the template, click the **Save Template** button to save it.

Tip: *After you have saved a template, a* ***Save As*** *button appears when you edit this template. The* ***Save As*** *button enables you to duplicate the template, so that you can make changes and save the template as a new template without affecting the original template. This can save you time as you do not have to reenter all the template information in order to create a new template. If you already have an existing template that is similar to the new template, simply edit the fields that you require, and then use the* ***Save As*** *button to create a new template.*

Newsletter Queues

A newsletter that has many recipients must be sent in stages. The process of sending the newsletter is managed by a queue. After you start this queue, it sends the emails in packs.

To send your newsletter using a queue:

1 From the **Newsletter** menu, select the **Newsletter Templates** option.

2 In the **Action** column of the relevant template, select the **Queue Newsletter** option.

3 In the **Queue Date Start** field, specify when the newsletter will start being sent.

4 Review the template and parameters and then click the **Save Newsletter** button to schedule sending the newsletter.

Newsletter Reports

Three newsletter reports are provided in the **Newsletter** menu, as described below:

- **Newsletter Queue:** Shows the newsletter queues that have been defined and indicates their progress in sending emails.
- **Newsletter Subscribers:** Shows a list of customers that have subscribed to your newsletter. It also enables you to unsubscribe these customers manually.
- **Newsletter Problem Reports:** Shows a list of errors that have occurred while sending the email. It enables you to remove the incorrect emails from the subscribers list.

9 Managing Orders and Customers

This chapter describes how to manage customers and how to add Orders from the backend. This chapter contains the following sections:

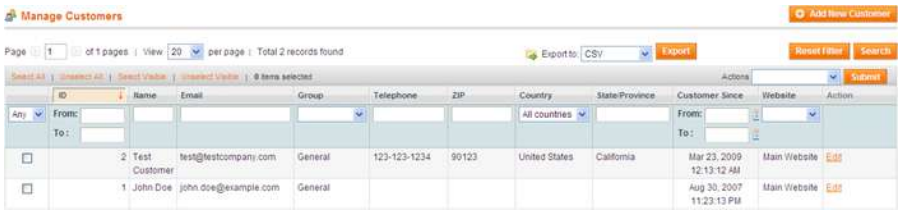
- **Managing Customers,** page 175
- **Managing Orders,** page 178

Managing Customers

Viewing and Editing Customers

To view existing customers:

1. From the **Customers** menu, select the **Manage Customers** option to see a list of all the customers that opened accounts in your web store or were added using the **Add New Customer** button, as shown below:



2. Click the **Edit** link on the right side of a customer's row or click the **Add New Customer** button to display the following page:

The tabs in the left panel provide a variety of types of information about the customer and for handling the relationship with a customer, such as: when the customer last logged in and out, addresses, ordering statistics, recent Orders, current shopping cart contents, their last reviews, the newsletter to which they subscribed and so on.

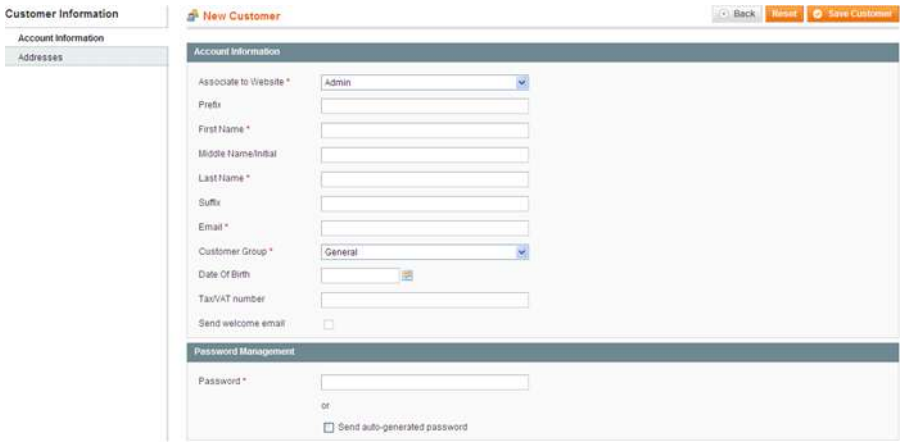
The Group to which the customer belongs determines which discounts are given to this customer, as defined in the **Catalog Price Rules** and **Shopping Cart Price Rules** which are described in the *Catalog and Shopping Cart Price Rules* section on page 156, and the tax rule that is applied to that customer.

Adding a Customer

Customers typically register themselves in your web store using the **My Account** link in the header of each page. In addition, you can use the following option to add a customer using the backend.

To add a new customer:

1. From the **Customers** menu, select the **Manage Customers** option.
2. Click the **Add New Customer** button to display the following page:



   This page enables you to define basic identifying information about the customer and his/her various addresses. Many aspects of the information retained about a customer in Magento can be accessed by editing the customer's information, as described in the *Viewing and Editing Customers* section on page 175.

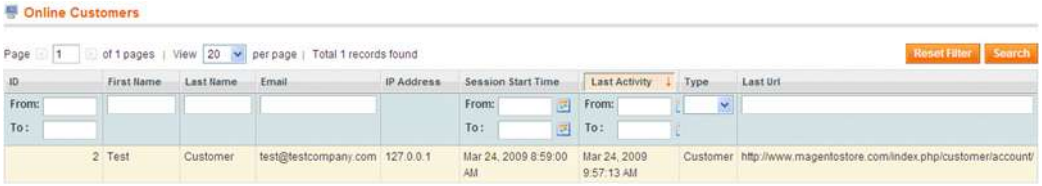
3. Fill out the customer's information and then click the **Save Customer** button.

Checking Online Customers

You can check which customers are currently online and view their activity.

To view online customers:

From the **Customers** menu, select the **Online Customers** option to display the following page:



Customer Reports

A variety of customer reports can be generated by selecting the **Reports** menu and then the **Customers** option.

The following describes the available Customer reports:

- **New Accounts:** Shows the customers that have opened accounts in your web store during the period that you specify.
- **Customer by orders total:** Lists customers with the ones that spend the most money in your web store listed first.
- **Customer by number of orders:** Lists customers with the ones that make the most orders listed first.

Managing Orders

The *Managing Orders* section in *Chapter 3, Introducing the Backend* on page 44 introduces the procedures for handling the day-to-day order management tasks in your web store. This section assumes that you have read that chapter.

You may refer to the *Viewing the Orders in Your Web Store* section on page 44 for a description of how to view and edit the Orders in your web store.

Orders Terminology

This section describes some of the terms used for handling Orders in Magento. In addition to creating Orders, there are many features in the Magento backend that are part of the process of managing and fulfilling Orders, such as creating Invoices, shipments and credit memos and editing and cancelling Orders.

Sales Order

When an Order is created in a Magento web store, either in the frontend or in the backend, a Sales Order is created to record this transaction. This Sales Order can be seen in the Orders list by selecting the **Orders** option from the **Sales** menu in the backend.

This is only a temporary record. Payment has not yet been processed and the Order can still be canceled.

Invoice

An Invoice is a record of the receipt of payment for an Order.

> ***Note:*** *In some cases, payment is automatically received during the creation of an Invoice.*

Creating an Invoice for a product's Order converts the temporary Sales Order into a permanent record of an Order, which can no longer be cancelled.

Multiple Invoices can be created for a single Order, each containing as much or as few of the purchased products that you specify.

Shipment

A Shipment is a record of the products in an Order which have been shipped. Like an Invoice, multiple Shipments can be created per Order, until all of the products in the Order are shipped.

Credit Memo

A Credit Memo is a record of a refund. A product cannot be refunded until it has been paid (which means that it has been Invoiced). This means that you are not able to create a Credit Memo until after an Invoice has been created.

The Credit Memo serves as a record of a refund, but it is not a record of a return (which is the actual returning of funds to the customer).

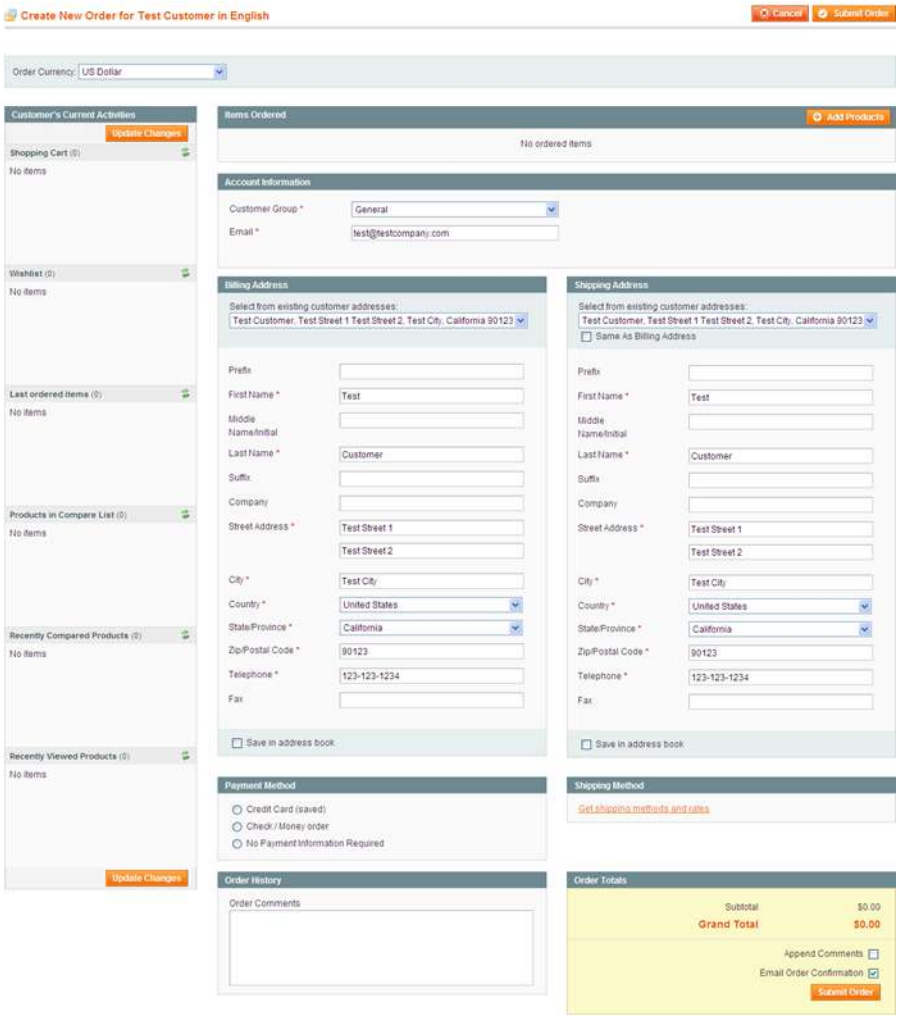
Creating New Orders

This section describes how to create an Order using the backend, such as when an Order is received on the phone.

To create a new Order from the backend:

1. From the **Sales** menu, select the **Orders** option.
2. Click the **Create New Order** button on the top right of the page to display the following page:

3 Select a customer or click the **Create New Customer** button to display the following page:



Note: *If your store has multiple store views, you are first asked in which of the store views the order should be created.*

Note: *If you selected to create a new customer, you need to fill all the address information.*

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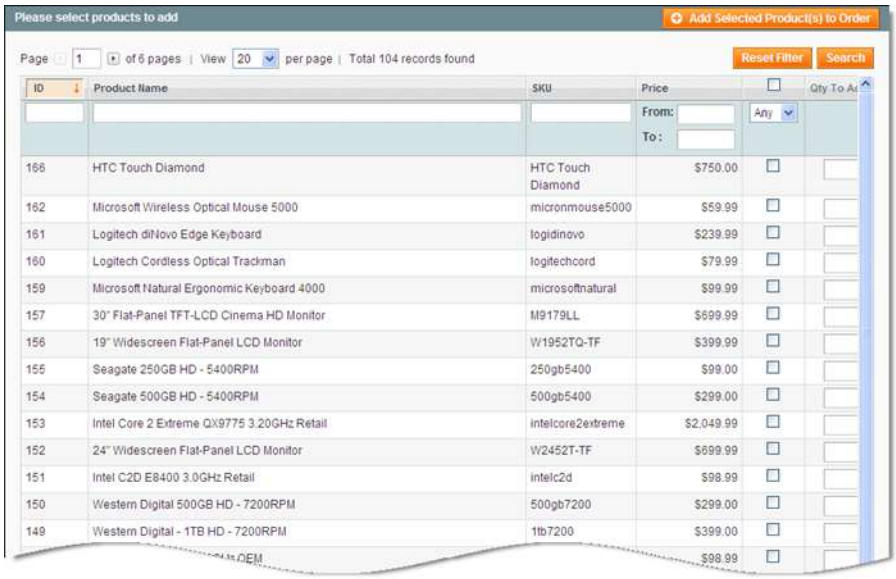
4 Click the **Add Products** button to display the following page:



5 Select the products to be purchased and click the **Add Selected Product(s) to Order** button.

> ***Tip:*** *If you selected one of the existing customers, then the left column shows a list of the products that this customer has in his/her cart, wish list, recently ordered, viewed or compared. To add one those products to the order, select the required product and click* ***Update Changes*** *button.*

6 Fill out the other mandatory fields of the Order, those marked by an asterisk (*), such as: shipping method and payment method.

7 You can define many options for the order like choosing custom prices for products and applying discount codes.

8 After you have completed all the required Order information, click the **Submit Order** button to display the order information page.

9 To confirm payment, click the **Invoice** button to generate an Invoice for your review.

10 Review the Invoice, and if all is well, click the **Submit Invoice** button at the bottom of the page.

11 When you are ready to ship the products, click the **Ship** button to generate a Shipment document.

12 If required, you can add a tracking number received from the shipping service by clicking the **Add Tracking Number** button. Adding a tracking number enables customers to review their Order using the **My Account** option that appears on the right side of the header of the frontend.

13 Review the Shipment. You can modify the quantity to be shipped if only part of the Order is ready.

The Order changes to **Completed** status after all its products have been shipped.

14 Click the **Email Copy of Shipment** option, shown below, to automatically send an email to the customer notifying them that their products were shipped.

15 Click the **Submit Shipment** button at the bottom of the page.

16 Click the **Back** button to return to the Orders page where you can create additional Orders if required. You may refer to *Chapter 9, Managing Orders and Customers* on page 175 for more details.

Refunding

You can create a record of a product refund from an existing Order by generating a Credit Memo.

To view the list of refunds made in your web store:

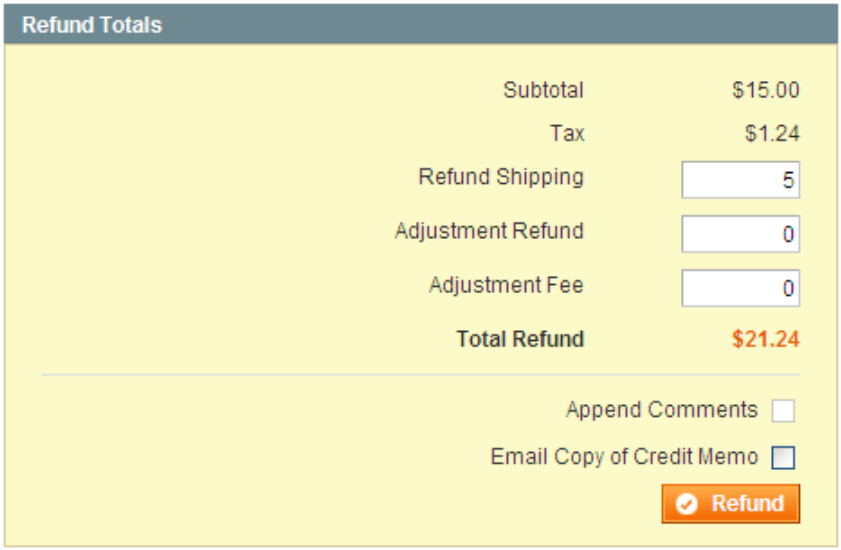
From the **Sales** menu, select the **Credit Memos** option to display the following page:

To refund a product from an existing Order:

__Note:__ You can create Credit Memos only for Orders for which Invoices were created. Without an Invoice, an Order is assumed not to be paid so that there is nothing to refund in a Credit Memo.

1. From the **Sales** menu, select the **Orders** option to display a list of the existing Orders.
2. Click the **View** link on the right side of the row of each Order to display the Order view page.
3. Click the **Credit Memo** button to generate a credit memo.
4. Scroll down to the **Items to Refund** area, as shown below, and in the **Qty to Refund** field of the relevant product, specify the quantity of products to refund.
5. To specify that this product was actually returned to the web store, check the **Return to Stock** option, shown below:

6. Click the **Email Copy of Credit Memo** option, shown below, to automatically send an email to the customer that the order has been refunded. You can also adjust the refund totals to match your business rules.



7 Click the **Refund** button at the bottom of the page. The total of the Order from which this product was refunded is updated automatically.

8 Click the **Back** button to return to the Orders page where you can create additional Orders, if required.

Important Note: *Currently, refunding an Order in Magento does not cause an actual payment refund. You must refund the payment on your own. Credit Memo is only a record used to track the refunds and to provide proper values in the reports.*

10 Managing Customer Generated Content

This chapter describes how to manage customer generated content, such as ratings, reviews, tags and polls. This chapter contains the following sections:

- **Managing Ratings and Reviews,** page 185
- **Managing Tags,** page 190
- **Managing Polls,** page 192

Managing Ratings and Reviews

Rating and review functionality is provided by Magento to enable customers and web storeowners to give their opinions, feedback and comments about products. This appears in the frontend, as follows:

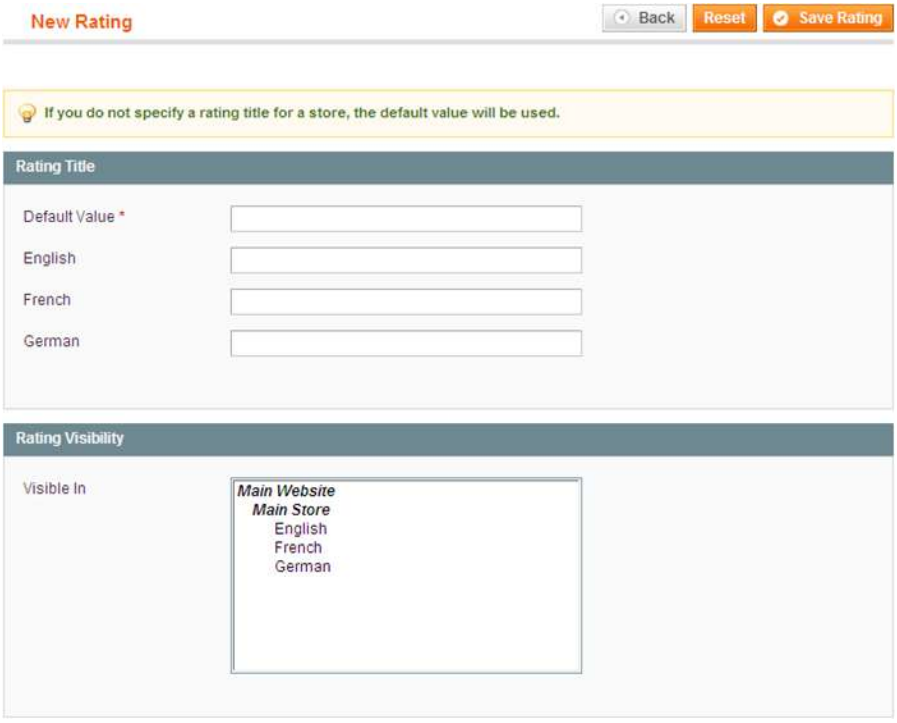
The quantity of stars indicates the satisfaction rating. You can click on the **Review(s)** link to display the actual reviews provided by customers or input your own Review, as shown below:

Customizing a Rating

This section describes how to create a new customized rating.

1 From the **Catalog** menu, select the **Reviews & Ratings** option and from the sub-menu select the **Manage Ratings** option to display the following page:

2 Click the **Add New Rating** button to display the following page:

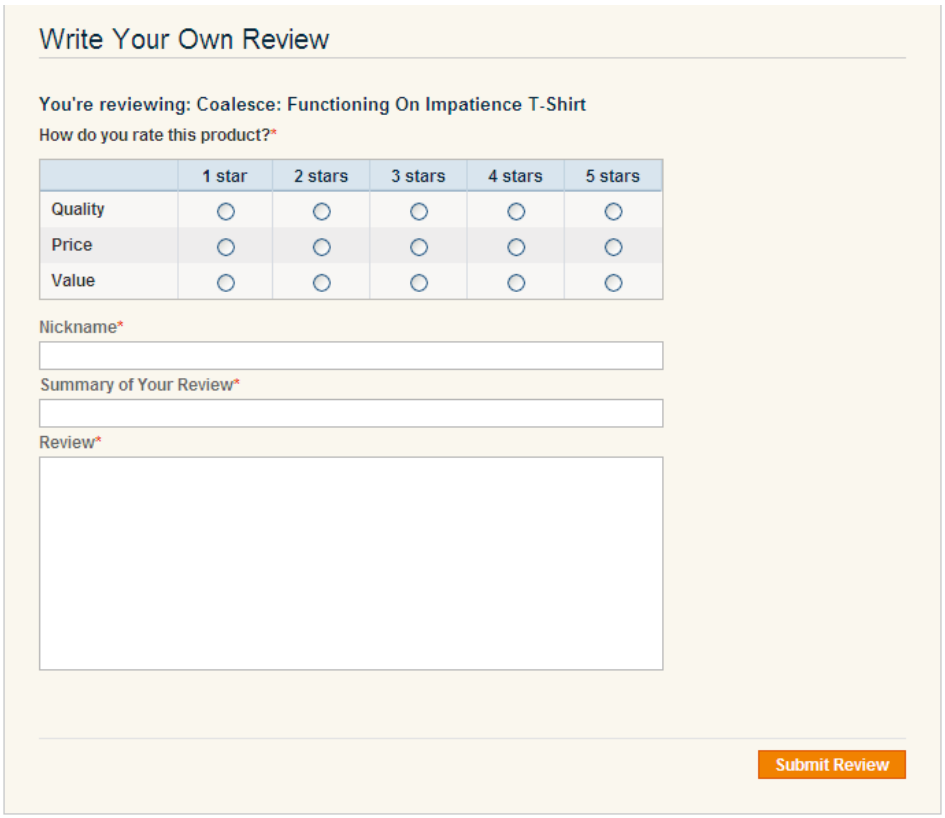


3 In the **Default Value** field enter a name for this rating.

4 Click the **Save Rating** button.

Customers Adding Reviews

A customer can enter a new review by clicking the **Add Your Review** button to display the following page in which to enter their review:



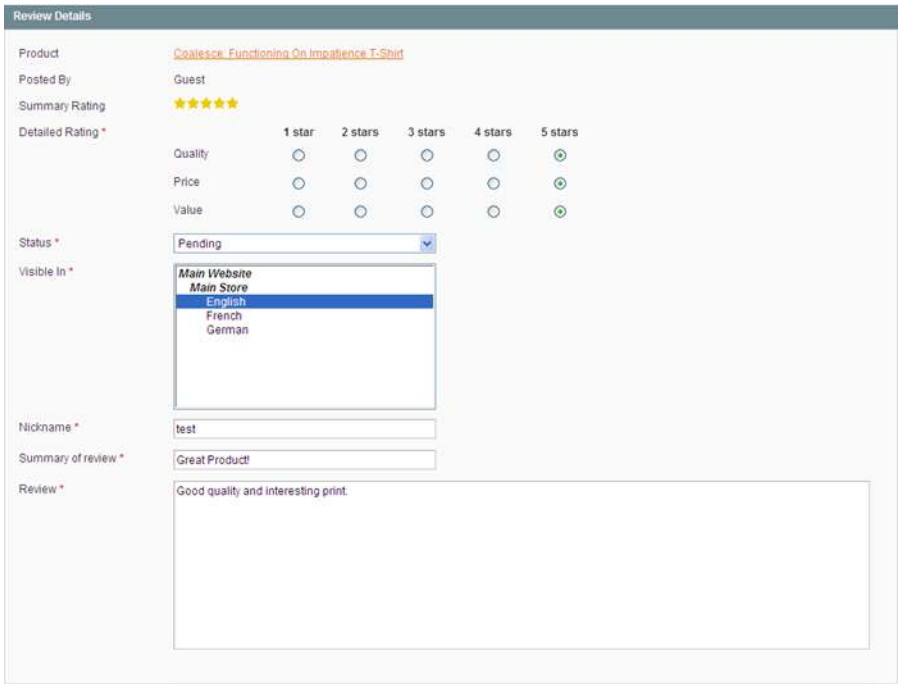
Approving Reviews for Public Viewing

New reviews entered by customers must be approved by the web store administrator in the backend before they appear on the frontend.

To view and approve new reviews:

1. From the **Catalog** menu, select **Reviews & Ratings ➔ Customer Reviews ➔ Pending Reviews** to display the following page:

2. Click the **Edit** link on the right side of the relevant review's row to display the following page:

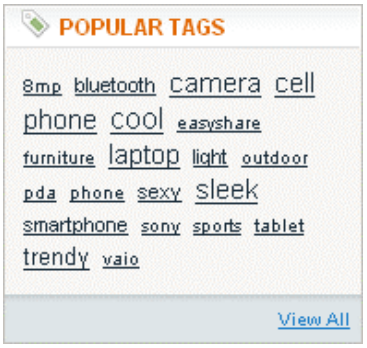


3. You can modify the review, if required.

4. In the **Status** field, change the **Pending** status to **Approved** or **Not Approved**.

Managing Tags

Tags can be assigned by customers directly in the frontend. A Tag describes a specific property of a product, such as Cool, Valentine's gift and so on. Popular Tags serve as a descriptor that customers can select in order to view the products to which a specific tag has been assigned. The following shows an example of various tags as they appear in the web store.



Adding Tags

The number of tags that can be added to a product is unlimited and they can later be renamed or deleted.

To add tags to a product in the frontend:

1. In the frontend, scroll to the **Product Tags** section which appears in the product page under the **Product Description** area, as shown below:

2. Use spaces to separate tags and use single quotation marks (') to indicate phrases, meaning a few words that must appear together. The image above shows what it looks like when a customer adds three tags:
   - rock and roll
   - t-shirt
   - red

   Note that phrases are inside single quotes. After submitting the tags, an administrator has to approve them.

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Approving Tags

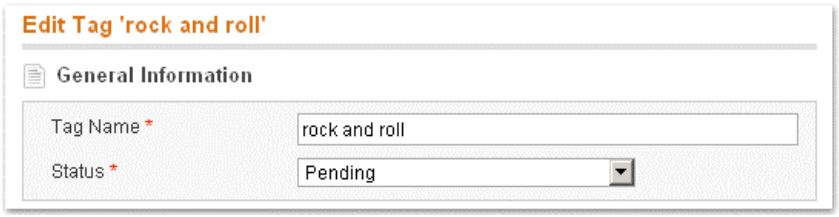
Tags must first be approved by the backend administrator before they appear on the front-end. Once a tag has been approved by the backend administrator it can be used for other products and does not need to be approved again.

To approve a tag:

1. In the backend, from the **Catalog** menu, select **Tags** ➔ **Pending Tags** to display the following page:

This page shows a list of tags that have not yet been approved.

2. In the **Action** field next to each tag, select one of the following Actions:
   - **View Products:** Displays a list of all products that have been tagged with this word or phrase.
   - **View Customers:** Displays a list of all the customers that have clicked this tag when viewing any product.
   - **Edit Tag:** Displays the following page in which you can change the **Status** column value from **Pending** to **Approved** or **Disabled**.



3. Click the **Save Tag** button.

> ***Tip:*** *You can select and change the status or delete multiple tags at once. Check their checkboxes and select the appropriate option from the* ***Action*** *field in the heading row. Next, click* ***Submit*** *to apply the selected action.*

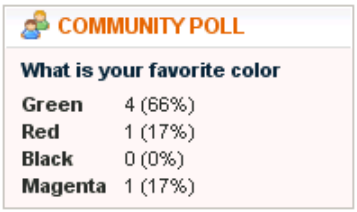
> ***Note:*** *If a customer has entered a tag that you do not want to ever see again, simply change the status to* ***Disabled****.*

Managing Polls

Polls provide a powerful marketing tool for finding out the opinion of your customers about your products, store, customer service and more.

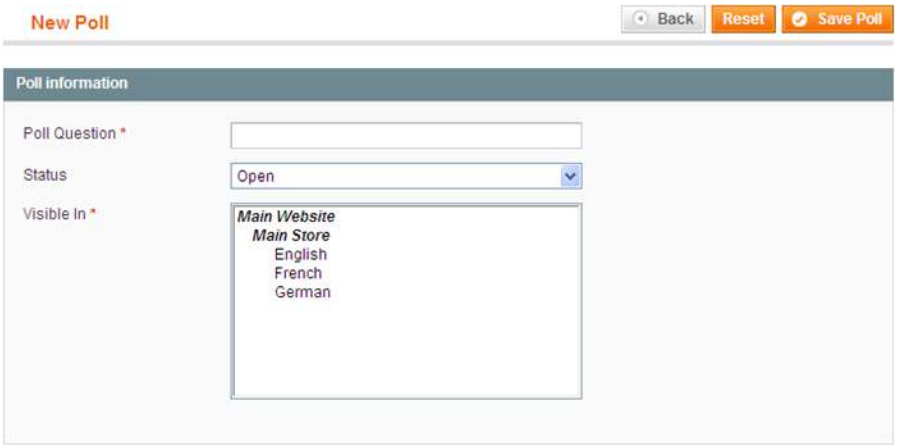
It is very simple to create a poll. The following shows an example of how a poll appears in the store:

A poll only occupies a small amount of space on your store pages and is shown in the right column by default. Poll results are immediately displayed to customers after an answer is submitted, as shown below:



To create a poll:

1. From the **CMS** menu, select the **Poll Manager** option, which shows a list of existing polls.
2. Click on the **Add New Poll** button in the top right corner of the window to display the following page:



3. In the **Poll Question** field, enter the question that your customer will be asked.
4. In the **Status** field, specify whether the poll is **Open** or **Closed**. The status of the poll is **Open** by default, which means that it appears in your store. If you do not want it to appear in your store, select the **Closed** option.
5. Select the store(s) you want the poll to appear in.
6. Click on the **Poll Answers** option in the left panel to display the following page:

7 Click on the **Add New Answer** button to add possible answers to your question that can be selected by your customers in the store. The following page is displayed:

8 In the **Answer Title** field, enter the text of the answer to appear in your store for customers to select.

9 To influence the poll results prematurely, you can add votes to the count in the **Votes Count** field, which is 0 by default.

10 Repeat steps 7 to 9 for each answer that you want to appear in this poll.

11 Click the **Save Poll** button.

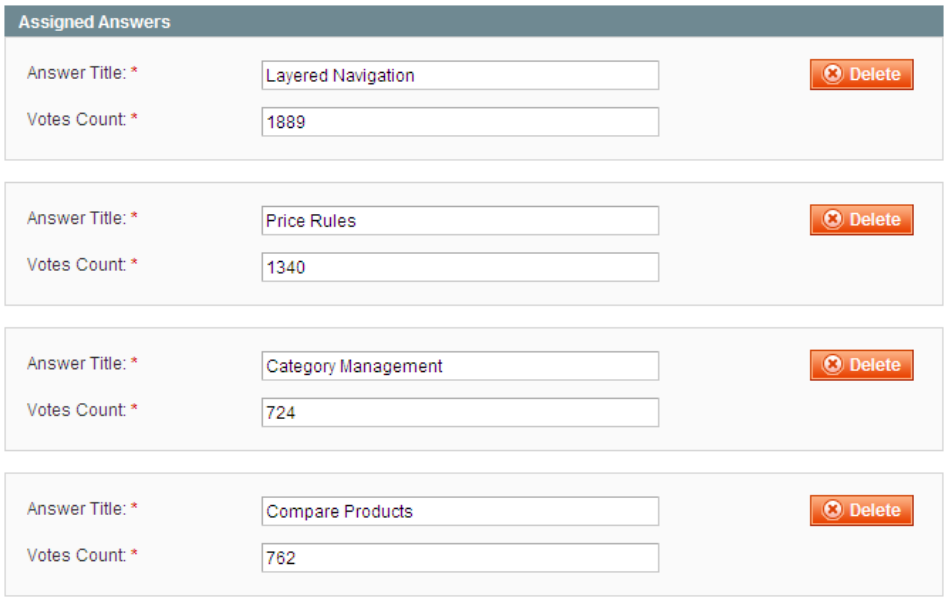
That's it! If the status of your poll is now **Open**, meaning that it will appear in the store. Customers can only answer a poll once and you can view the results here. If you have multiple polls, they will cycle randomly in the front-end, meaning every time a user refreshes a page they may see a different active poll question.

Editing a Poll

Once a poll has been created, you can edit it by selecting the **Poll Manager** option from the **CMS** menu. Click on the relevant poll in the list of polls to view its details.

To close the poll so it no longer appears in the store, change the **Status** field to **Closed** in the **Poll information** section.

To see the votes that have been tallied for each answer, click the **Poll Answers** option in the left panel to display the number of votes in the **Vote Count** field, as shown below:



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11 Monitoring and Improving the Web Store

This chapter describes how to monitor and improve your web store by defining reports, search terms, synonyms, redirects and Google Analytics. This chapter contains the following sections:

- **Reports,** page 197
- **Search Terms,** page 200
- **Search Synonyms and Redirects,** page 201
- **Google Analytics,** page 203

Reports

This section describes some of the most important reports in Magento. This section first provides a full description of how to generate a Sales Report and a brief description of other important reports.

Generating Reports

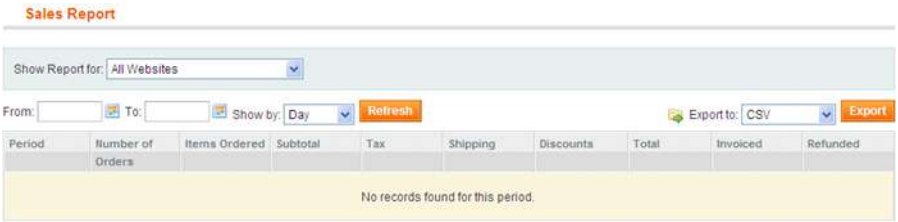
Magento provides a variety of reports that you can access at any time. To see the reports that you can generate in Magento, from the **Reports** menu, select a type of report and then select a specific report of that type.

Sales Report

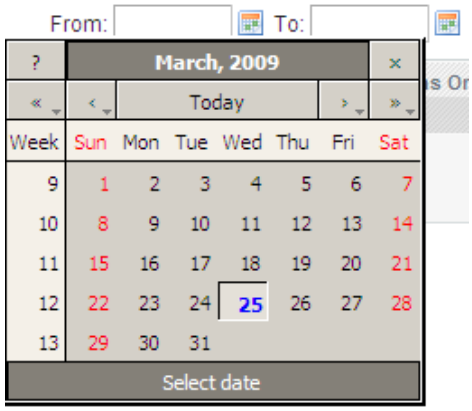
The Sales report provides information about the sales in your web store.

To display the Sales report:

1. From the **Reports** menu, select the **Sales** option and then **Sales Report** to display the following page:

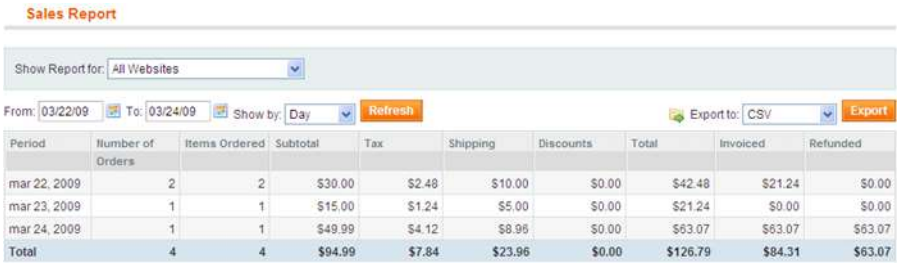


2 In the **From** and **To** fields, specify the start and end date of the information to be included in the report. You can click the calendar icon to display a date picker, as shown below:



3 In the **Show By** field, specify whether the information in the report is aggregated by **Day**, **Month** or **Year**.

4 Click the **Refresh** button to display the report, as shown below:



Period	Number of Orders	Items Ordered	Subtotal	Tax	Shipping	Discounts	Total	Invoiced	Refunded
mar 22, 2009	2	2	$30.00	$2.48	$10.00	$0.00	$42.48	$21.24	$0.00
mar 23, 2009	1	1	$15.00	$1.24	$5.00	$0.00	$21.24	$0.00	$0.00
mar 24, 2009	1	1	$49.99	$4.12	$8.96	$0.00	$63.07	$63.07	$63.07
Total	**4**	**4**	**$94.99**	**$7.84**	**$23.96**	**$0.00**	**$126.79**	**$84.31**	**$63.07**

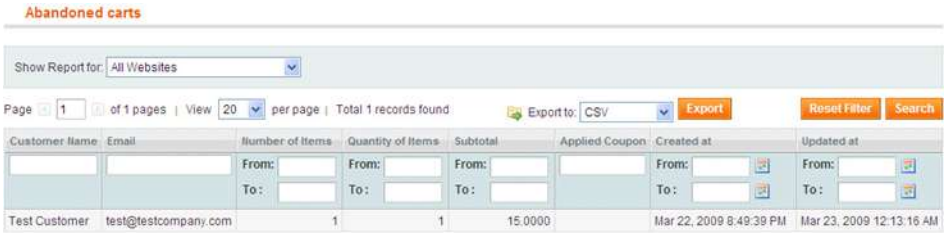
5 To export the report information shown on the screen, select the **CSV** (Comma Separated Values) option or the **Excel** option from the **Export to** field on the top right.

Abandoned Carts Report

The Abandoned Carts report shows information about shopping carts that were started and then abandoned, meaning that after putting some products in the shopping cart, the customer did not complete an Order and the sale was lost.

To display the Abandoned Carts report:

From the **Reports** menu, select the **Sales** option and then **Sales Report** to display the following page:



Tip: *This reports enables you to contact the customers and offer them discounts or otherwise turn an abandoned cart into a conversion.*

Best Selling Products

The Bestsellers report shows information about the best selling products (those that sold the highest quantity) in your web store, as shown below:

To display the Bestsellers report:

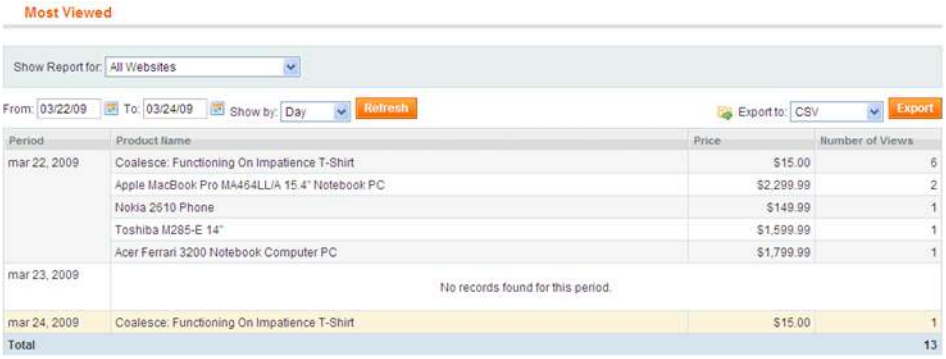
From the **Reports** menu, select the **Products** option and then **Bestsellers**. Next, select the desired **From** and **To** date and click **Refresh** to display the following page:

Most Viewed Products

The Most Viewed report shows information about the most frequently viewed products in your web store, whether they were purchased or not, as shown below:

To display the Most Viewed report:

From the **Reports** menu, select the **Products** option and then **Most Viewed**. Next, select the desired **From** and **To** date and click **Refresh** to display the following page:



Search Terms

The Search Terms report shows information about the most frequently used search terms in your web store. Searches can be performed in your web store by entering a term in the **Search** field in the top right corner of the web store page, as shown below:

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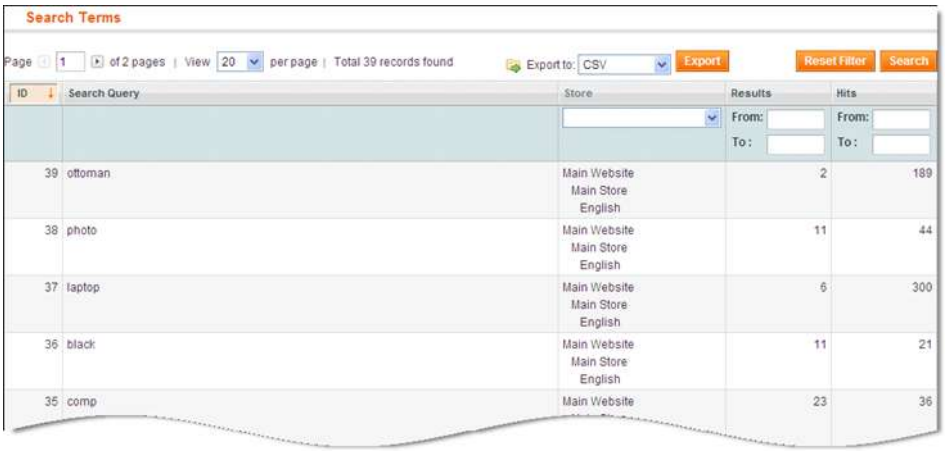
To display the Search Terms report:

From the **Reports** menu, select **Search Terms** to display the following page:



The **Results** column specifies how many times a specific search term was used by a customer in your web store.

The **Hits** column specifies how many products in total were displayed as the results of searches that contained this search term.

This report enables you to fine-tune the Attributes and Tags that you create in the backend in order to optimize the search results displayed to customers.

Tip: *If you see that the **Hit** field of a product shows a high number (meaning that customers search for it often), but the **Results** column shows a low number or zero, then you should review your products names and descriptions to promote products related to this keyword.*

Search Synonyms and Redirects

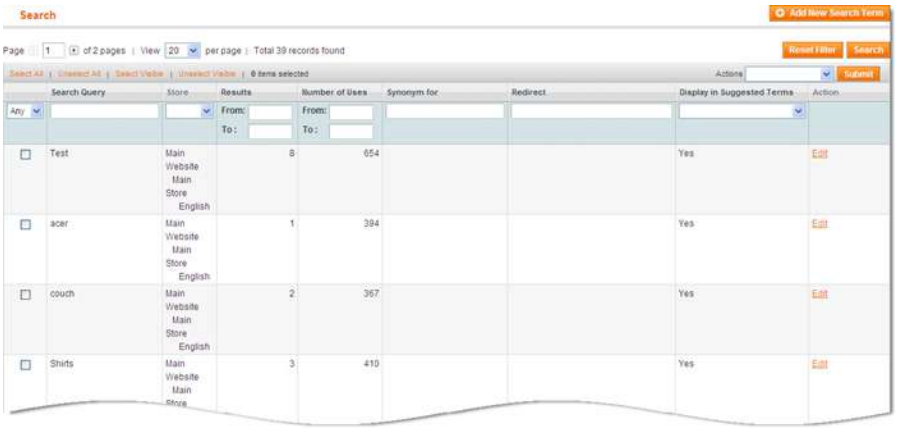
The following shows you how to fine-tune Magento's search behavior. Two mains options are provided:

- **Search Synonyms:** Misspelled search terms may mean missed opportunities for you. If you know that a frequently used search term is often misspelled by customers, and thus does not display results, you can add additional search terms, as described below.
- **Redirects:** You can specify that when a customer searches for a certain term that they are re-directed to a specific page. Direct customers to a specific product page, a specific brand landing page or to informational pages. For example: Returns will direct customers to the Shipping Policy page.

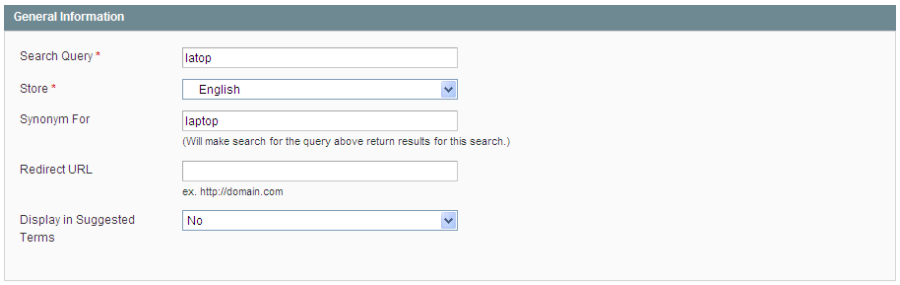
In the following example, we show how, when a customer enters the search term **latop**, the web store returns the results for the search term **laptop**.

To add new search synonym and or redirection:

1. From the **Catalog** menu, select the **Search** option to display the following page:



2. Click the **New Add New Search Term** button to display the following page:



3. In the **Search Query** field, specify the incorrect spelling of the term, for example **latop**.
4. In the **Synonym For** field, specify the correct search term that is defined in your web store, for example **laptop**.
5. In the **Redirect URL** field, specify the URL to which the customer is redirected when no results are returned for a search term.
6. Click the **Save Search** button.

Google Analytics

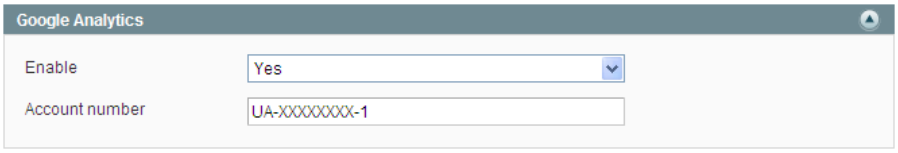
Google Analytics is a free service offered by Google to help websites owners find out more about the traffic on their website and about conversions. Magento supports both the following options:

- **Page View Tracking:** Enables you to see the origin from which your web store visitors linked to your store.
- **E-commerce Tracking:** Enables you to see which customers make purchases and what they buy.

You can sign up to this service at https://www.google.com/analytics. While signing up, a report is displayed showing your new Google Analytics account number in the following format: UA-XXXXXXX-1. Write this number down, because it is required for configuring Google Analytics in Magento, as described below.

To add Google Analytics tracking to Magento:

1. From the **System** menu, select the **Configuration** option.
2. From the **SALES** area in the panel on the left, select the **Google API** option. Expand the **Google Analytics** section to display the following:



3. In the **Enable** field, select **Yes**.
4. In the **Account number** field, enter the Google Analytics account number that you wrote down when you signed up at www.google.com, as described above.

> ***Tip:*** *Magento supports native integration with Google Website Optimizer, which is another free service from Google that enables you to test different versions of page elements and to select the elements that provide the best conversion rates.*

12 Keeping Your Store Healthy

This chapter describes how to keep your store healthy by using a staging environment, updating Magento and extending Magento. This chapter contains the following sections:

- **General,** page 204
- **Staging Environment,** page 204
- **Updating Magento,** page 205
- **Extending Magento,** page 207

General

Now that you have your own web store running and are selling products, do not forget to keep it in good condition. Make sure that your hosting provider performs regular file and database backups.

Staging Environment

If you plan to change and develop your web store over time, we recommend that you set up a staging environment (also called a testing environment) in which you can test your ideas before applying them to the live store. We highly recommend that you also use this environment when updating new versions of Magento.

At its simplest, the staging environment is just like any other Magento installation that is not accessible to the public. If you are modifying the files, you can keep them synchronized with the live files using any of the various available version control tools.

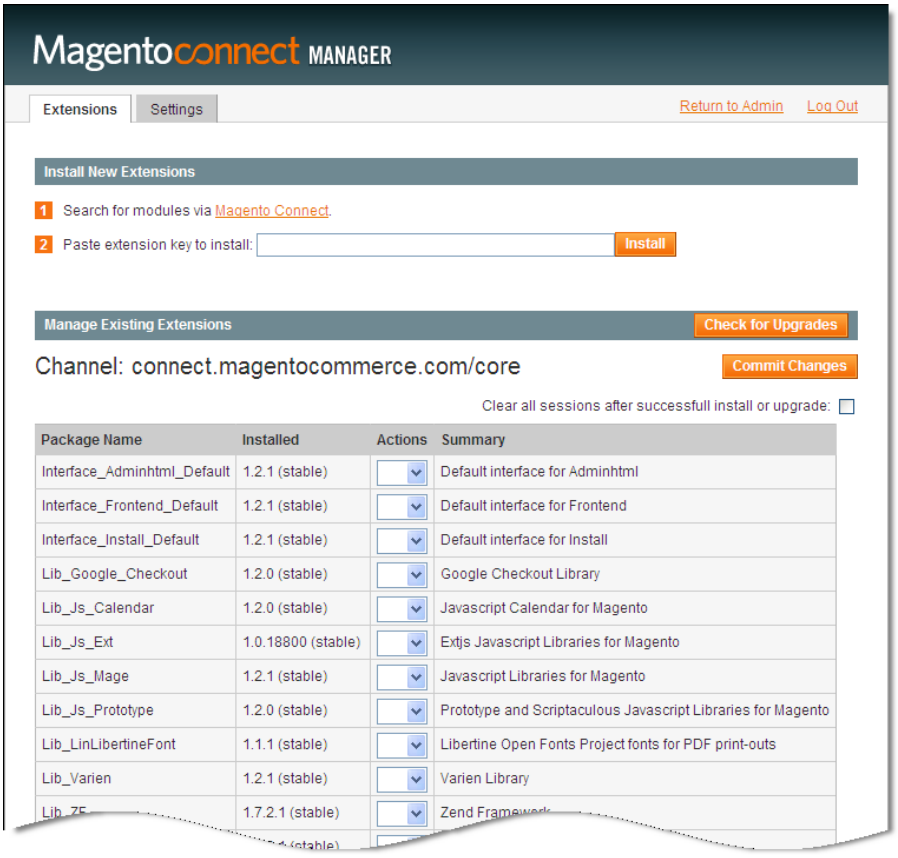
Updating Magento

Magento is constantly evolving. New features are added and problems resolved on an ongoing basis. From time to time you will be notified about a new Magento version. This notice will be published in the Magento blog and the backend will display a message when you log in. If the update is critical, contains mandatory functionality or resolves issues that you have encountered, you should definitely update your web store.

Warning: *If your store has a custom theme, when you upgrade it to a new version, you will benefit from the bug fixes, but new front-end functionality may not be visible. Upgrading between major versions, such as between version 1.1 and 1.2 can render your site and any custom functionality unusable until your perform a few minor configuration changes (which are usually noted along with the new version annoucement). We highly recommend that you first test all upgrades in a staging environment before applying it to your live store.*

To update your web store to a new version:

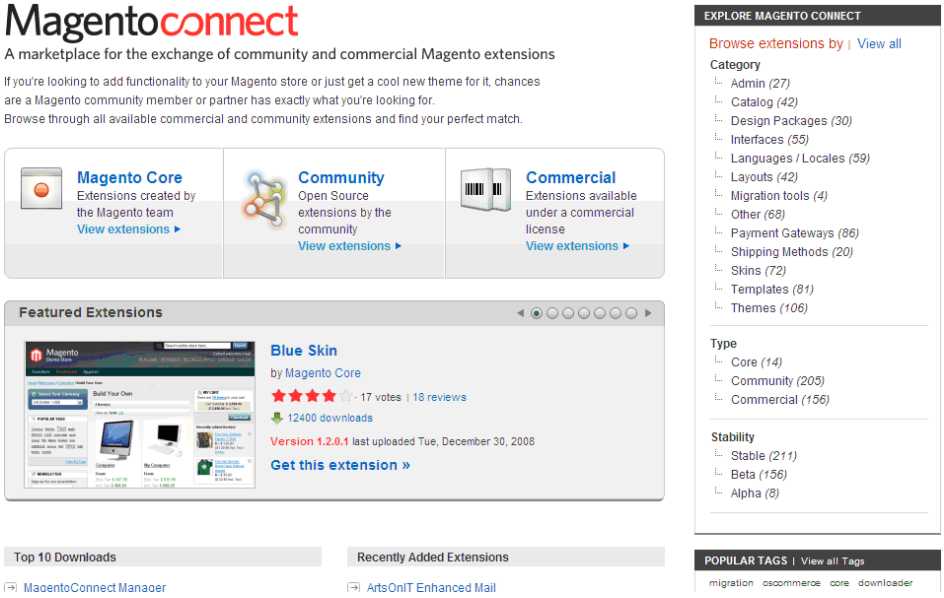
1. From the **System** menu, select the **Magento Connect** option and then the **Magento Connect Manager** option.
2. Log in using your backend username and password and click **Log In**. The following window is displayed:



3. Click the **Check for Upgrades** button. If there are upgrades available for any of the Magento modules, they are marked in yellow.
4. In the **Actions** field, select the upgrades to be installed and click the **Commit Changes** button.
5. Wait until the installation has finished and click the **Return to Admin** link in the header.
6. Congratulations! You have just upgraded your Magento. Now check your site to make sure everything works as expected.

Extending Magento

There are hundreds of payment gateways and shipping providers all over the world. Magento out-of-the-box supports a few of the most popular ones. However, community members are developing and publishing new extensions in order to extend Magento with various new features. If you need to add functionality to Magento, you should first search for it on **Magento Connect**, which is our marketplace for extensions. You can access **Magento Connect** at: http://www.magentocommerce.com/magento-connect. The following page is displayed:



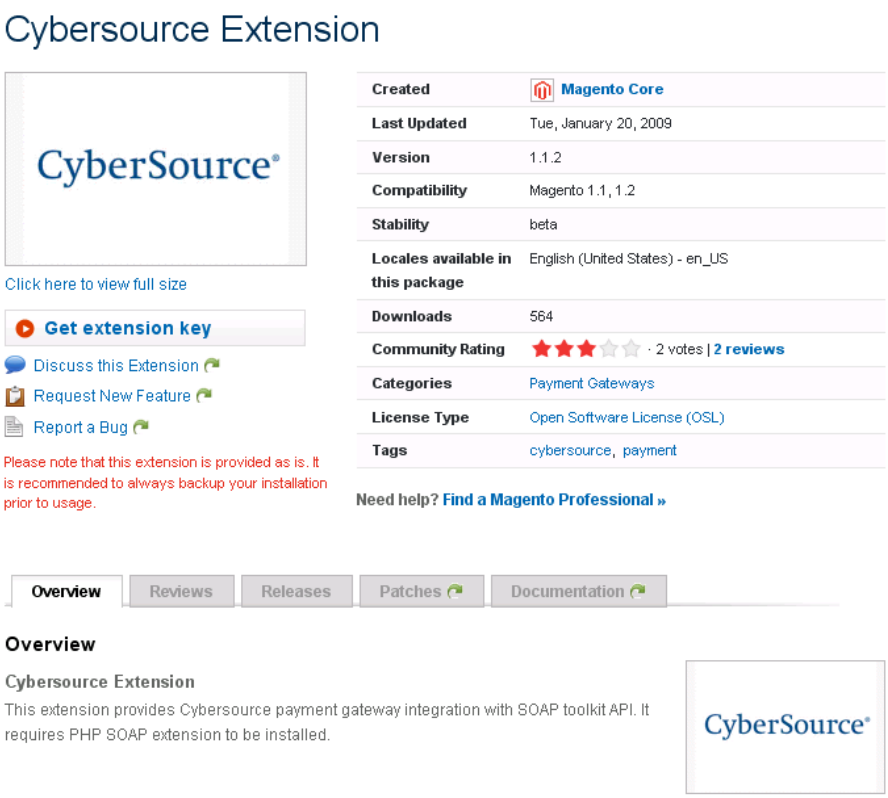
Various free extensions are provided from this page.

The following example shows how to install CyberSource core payment extensions that add a new payment method to the store called **CyberSource**.

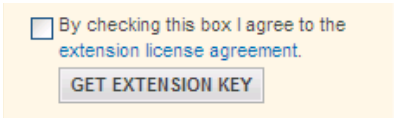
> ***Note:*** *There are also commercial extensions available for purchase on their publishers' pages. The installation process for each one may vary. Please consult the extension author for installation instructions.*

To install a free extension:

1. Go to the **MagentoConnect** page on the **MagentoCommerce** site at http://www.magentocommerce.com/.
2. Browse through the extensions using the filters provided in the panel on the right.
3. Go into the details page of each selected extension to display a page similar to the following:



4. Click the **Get extension key** button to display the following:



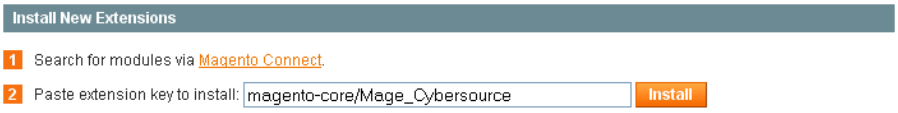
5. Read and accept the licensing agreement by checking the checkbox shown above.

6 An extension key similar to the following is displayed:
magento-core/Mage_Cybersource
This is a special link to an extension that Magento recognizes. Copy it to the clipboard (**Ctrl + C**).

7 From the **System** menu in your Magento Backend Panel, select the **Magento Connect** option and then the **Magento Connect Manager** option.

8 Log in using your backend username and password and click **Log In**.

9 Paste the extension key in the **Install New Extensions** section, as shown below:



10 Click the **Install** button and wait until the installation has finished.

You can now return to the backend and start using the extension that you have just installed!

Note: *After you install a payment module, then this new option appears in the* ***System*** *menu under* ***Configuration ➔ SALES ➔ Payment Methods****.*

13 Getting Help

Magento offers a variety of options and possibilities, but also has a learning curve. Varien provides several resources for getting help discovering Magento and using it daily to attain your eCommerce objectives.

You can start with the **Search** field at the top of the community site found at http://www.magentocommerce.com, which provides results from the Magento forum, knowledge base, wiki, groups and other resources.

If you are unable to find answers to your questions, try posting your question in the Magento forums where thousands of participants help each other with Magento issues.

To access Magento forums:

Go to http://www.magentocommerce.com/boards and log in using the username and password that you have created while downloading Magento. Choose a forum that best matches your question.

Tip: *For those of you that require a guaranteed response time, Varien offers support agreements at http://www.magentocommerce.com/support/. This web page also offers consulting services to help you with any task that is not covered by support.*

If you found the answer yourself and were unable to find it elsewhere, please share it with others. Use the wiki or forums to write and share it.

There are also several other community features in addition to the forums described above that enable the exchange of ideas and help. They are:

- **Groups:** Link community members working on or interested in specific subjects, such as Designing For Magento and Drop Shippers.
- **Chat:** Provides a real time discussion with Magento community members.
- **Wiki**: Provides community editable pages for sharing ideas and findings, tutorials and information

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The following lists other resources available to help you use get the most out of Magento:

Knowledge Base

The Magento knowledge base is a Wiki that provides instructions published by Magento or community members in the form of guides and how-to's.

At: http://www.magentocommerce.com/knowledge-base

Webinar Archive

Up-to-date webinars are provided by Magento in which you can learn real-world tips and tricks in order to get the most out of your stores and promotions.

At: http://www.magentocommerce.com/media/webinar-archive

Screen casts

Screen casts are presentation videos that can guide you through many of the Magento features.

At: http://www.magentocommerce.com/media/screencasts

Magento User Guide

The Magento User Guide provides explanations and detailed field descriptions about many of Magento's features.

At: http://www.magentocommerce.com/support/magento_user_guide

Magento Designer's Guide

The Magento Designer's Guide provides information for designers describing Magento concepts and design implementation in Magento.

At: http://www.magentocommerce.com/design_guide

Magento Blog

The Magento Blog contains fresh updates describing new Magento releases, interesting showcases and events.

At: http://www.magentocommerce.com/blog

Technical Documents and Magento Core API

These provide developers with information on how to develop Magento.

At: http://docs.magentocommerce.com/

Here you can find information about all Magento classes and functions.

At: http://www.magentocommerce.com/support/magento_core_api

Here you can find information and usage examples for calling Magento using an API. This enables easier integration of Magento with existing systems.

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